



# Patron Services Administration Guide

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# Patron Services Administration Overview

This section contains the following topics:

- [Setting Circulation Permissions](#)
  - [Override Patron Services Permissions Blocks](#)
  - [Setting Patron Services Parameters and Profiles](#)
  - [Setting Circulation Policy and Database Tables](#)
- 

## Setting Circulation Permissions

Before your staff can do patron registration, patron accounting, and circulation tasks in the Polaris staff client or Leap, you must set specific permissions to do the tasks. Circulation permissions define who can create, access, and work with patron records and circulation functions. Each organization can specify which groups, workstations, and staff members are allowed to work with records and control processes. For detailed information about managing Polaris permissions, see the Polaris Administration PDF Guide, Granting Permissions.

**Note:**

Certain System Administration permissions are required to assign permissions. See the Polaris Administration PDF Guide, Permissions to Set Permissions.

See also:

- [Set circulation security](#)
- [Override patron services permissions blocks](#)
- [Circulation Permissions Reference](#)

## Set Circulation Security

To review and set circulation security:

1. In the Administration Explorer tree view, select the **Security** folder for the organization for which you want to set circulation permissions. Certain permissions related to holds, interlibrary loans, patron registration, and patron status (accounting) must be set for each branch that does these functions. Other permissions are set at the system level.

The Security view is displayed in the details pane.

**Tip:**

To display all the circulation permissions, select (highlight) **Circulation** in the Control Record list, and press ALT+\*(on the numeric key pad).

2. Double-click **Circulation** in the **Control Record** list.
3. Double-click the record or function for which you want to assign permissions. The permissions list for the selected object appears.
4. Select the permission you want to assign. The staff members, workstations, and groups that have the permission for the organization are listed under **Individuals With Permission**.

**Note:**

For a list of the permissions that are required to do specific circulation and patron services tasks, see

5. Add the resources (groups, workstations, staff members) that need the selected permission by doing the following steps:
  - a. Click **Assign**, and select the resource type. The Polaris Find Tool appears.
  - b. Use the Find Tool to search for and select one or more resources. The Administration Explorer is displayed. The selected resources are displayed in the **Individuals With Permission** list.
6. Repeat steps 3-5 as needed.
7. Select **File > Save** to save your changes.

**Note:**

To apply your permission changes to the staff client, exit the staff client and log back in.

See also:

- [Setting Up Course Reserves](#)
- [Circulation Permissions Reference](#)

## Override Patron Services Permissions Blocks

When a staff member does not have the appropriate permission to do a patron services/circulation task, a permission block message appears. You can allow certain staff members or supervisors to override the permission block so that the staff member without permission can continue the blocked task.

Set the Patron Services profile **Override patron services blocks to Yes** at the staff member level for the staff member who should be able to override permission blocks. For more information about how to set profiles, see [Setting Patron Services Parameters and Profiles](#).

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## Setting Patron Services Parameters and Profiles

Patron Services parameters and profiles control both patron services and circulation functions. The sets of available parameters and profiles are different for each administration level (system, library, and branch). Separate sets of parameters control requests, notification, self-check operations, and credit card transaction processing.

You can view and set the Patron Services parameters and profiles from the Administration Explorer or an administration workflow.

**Note:**

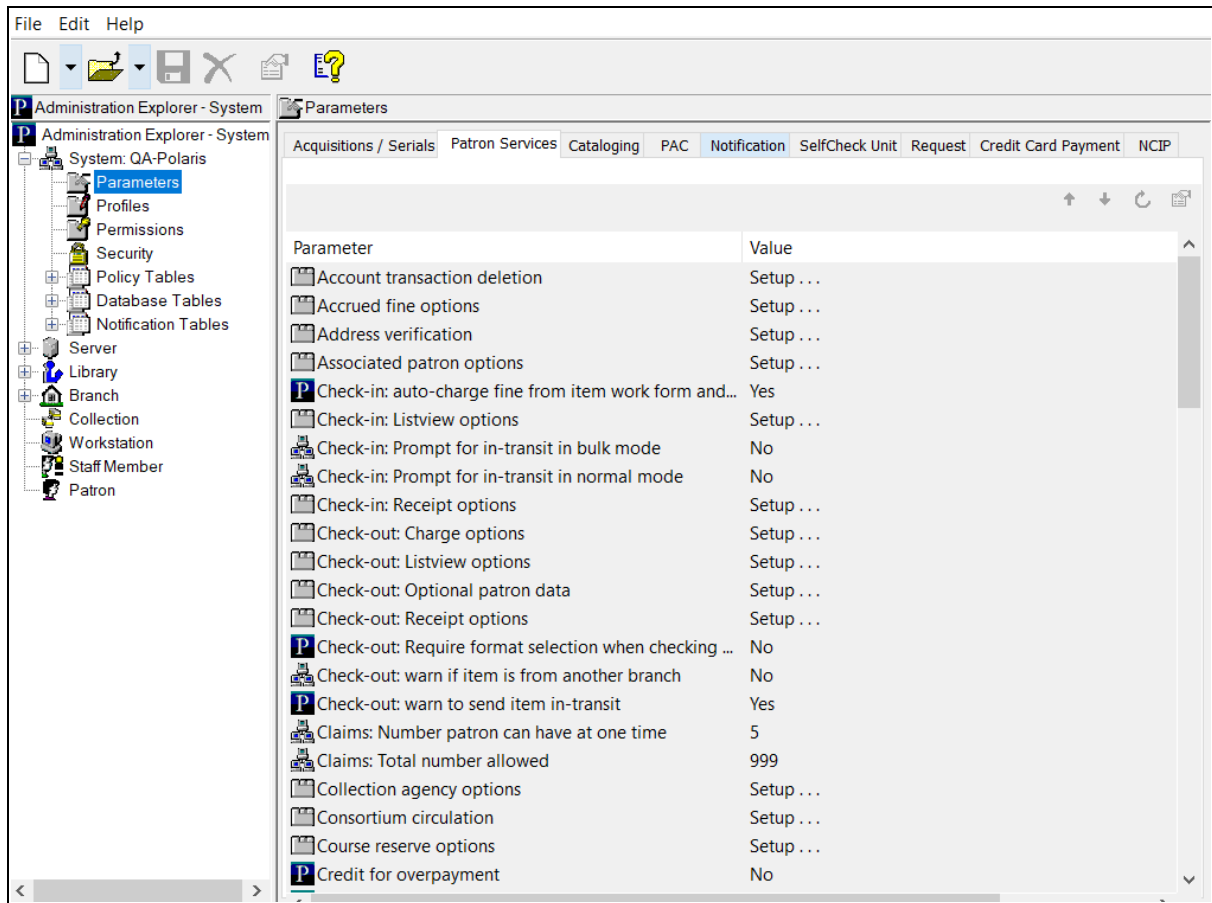
These System Administration permissions are required to modify parameters and profiles: **Access Administration: Allow; Libraries: Access; Branches: Access; Modify parameters: Allow; Modify profiles: Allow.**

See also: [Review and Set Patron Services Parameters and Profiles](#)

## Review and Set Patron Services Parameters and Profiles

To review and set Patron Services parameters and profiles:

1. In the Administration Explorer tree view, expand the organization for which you want to set parameters.
2. Select **Parameters or Profiles** in the list under the expanded folder. The **Parameters or Profiles** tabs are displayed in the details view.
3. Select the **Patron Services** tab. The list of Patron Services parameters appears.



4. Use the scroll bar to review all the parameters or profiles in the list.
5. Double-click the parameter or profile you want to set. The parameter or profile value is highlighted, ready for editing, or a dialog box appears.

**Tip:**

To get a setting from the next higher organizational level, right-click the parameter or profile and select **Inherit higher level values**. To give a setting to multiple lower organizations, right-click the parameter or profile and select **Transmit values to lower levels**. Not all settings can be inherited or transmitted.

6. Set the parameter or profile as follows:
  - Type text.
  - Use arrows to select an option.
  - In a dialog box, enter the information and click **OK**.

7. Select **File > Save** to save any changes.

**Note:**

To see the effects of your parameter and profile changes in the staff client, exit the staff client and log back in.

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## Setting Public Access Profiles and Parameters

Public access parameters and profiles control general aspects of public access, and specific functions related to Polaris PowerPAC, Polaris PowerPAC Children's Edition, and Polaris Mobile PAC. You can make most settings at the system, library, or branch level. You can view and set public access profiles and parameters from the Administration Explorer or an administration workflow.

**Note:**

These System Administration permissions are required to modify profiles and parameters: **Access Administration: Allow, Libraries: Access, Branches: Access, Modify parameters: Allow, Modify profiles: Allow, System: Access, System: Modify.**

Your library may use multiple Polaris public access applications:

- Polaris® PowerPAC™ provides responsive Web-based access to library searches and services from remote computers, tablets, and smartphones, and from devices in the library.
- Polaris® PowerPAC™ Children's Edition is the Web-based application designed specifically for children's use.
- Polaris Mobile PAC is the Web-based PAC application designed for mobile devices.

**Note:**

The Statistical Summary report provides detailed information about system activity, including PAC activity such as patron logins, patron self-registration, holds placed from PAC, and holds cancelled from PAC. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System** in the Polaris Reports dialog box.

See also:

- The PAC Customization PDF Guide, PAC Administration Profiles Reference topic.

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## Setting Circulation Policy and Database Tables

Many circulation workflows are affected by policy and database table settings. Some tables define the options available for specific fields in item and patron records, while others identify values used in circulation transactions, such as due date calculation and overdue fine calculation. The tables are typically set up during implementation, data conversion, or Polaris site installation. Many can be edited as your needs change. You can edit some tables at the branch level. Other settings must be shared by all organizations.

**Note:**

Specific System Administration permissions are required to work with circulation policy, database, and notification tables. For more information, see the Polaris Administration PDF Guide, Grant Administration Permissions.

For general information about tables in Polaris, see the Polaris Administration PDF Guide, Working with Tables.

## Defining Patron Account Features

Patron records store patron registration and account information. In Polaris Administration, you set up default values for patron records in the Polaris staff client, Leap and the PAC; criteria for detecting duplicate records; and criteria for deleting them. Additional settings affect patron accounting operations such as paying and waiving charges.

**Note:**

For information about setting up e-commerce (credit card processing) in the staff client, PAC, and Polaris ExpressCheck, see [Setting Up E-Commerce](#).

See also:

- [Defining Patron Codes](#)
- [Setting Up User-Defined Fields](#)
- [Setting Up Patron Custom Data Fields](#)
- [Setting Patron Registration Required Fields and Defaults](#)
- [Setting Express Registration Defaults and Requirements](#)
- [Charging for Patron Registration](#)
- [Setting Patron Duplicate Detection](#)
- [Setting Reading History Options](#)
- [Setting Up Patron Messages](#)
- [Setting Up Patron Photos](#)
- [Setting Options for Deleting Patron Records](#)
- [Setting Patron Accounting Options](#)
- [Setting Payment Method Options](#)
- [Date Sources in Patron Records](#)
- [Removing Patron ID Information from Transaction Files](#)



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## Defining Patron Codes

Patron codes define available services, loan periods, fines, and limits for specific classes of patrons. They are also used for reports. An appropriate patron code is typically assigned to the patron when the patron registers.

You define patron codes in the Patron Codes policy table, which can be opened from an organization workflow or with the Administration Explorer. All organizations have access to the same set of patron code names because the codes can be entered and changed from the system, library, and branch levels. Changes are immediately applied to all Polaris records that use the code, regardless of which organization owns the records.

Patron codes are available as selections in the Fines policy table, Loan Periods policy table, and the **Patron code** box on the Patron Registration workflow. Each organization can filter the list of codes so that only selected codes are available for use in the **Patron code** box on the Patron Registration workflow for that organization's patron records. The illustration shows the Patron Registration workflow.

**Note:**

These System Administration permissions are required to modify the Patron Codes policy table: **Access administration: Allow; Access tables: Allow; Modify patron codes table: Allow.**

See also:

- [Filter Patron Codes for Specific Organizations](#)

## Managing Hold Requests

Use the Request parameter, **Hold options**, to specify how your library organization manages holds. In the Administration Explorer tree view, open the **Parameters** folder for the System, and click the **Request** tab in the details view. Then, double-click **Holds options** to open the Hold Options dialog box.

See also:

- [Set Holds options: Charge for hold requests](#)
- [Set Holds options: Expiration and Unclaim limits, Deletion options](#)
- [Set Holds options: Enabling, Item Status Restrictions, First Available Copy](#)
- [Set Holds options: Exclude pickup branches](#)

- [Set Holds options: Enable patrons to change the holds pickup branch from the PAC](#)
- [Set Holds options: Preferred borrowers branches](#)
- [Set Holds options: Alerts and blocks](#)
- [Set Holds options: Trapping preferences, queue settings](#)

To allow renewals when an item is out to a patron but there are hold requests with certain statuses, the renewal is blocked by default. You can change the setting to allow renewals of these items as long as the item is not the only one available to fill the request. See [Allow renewals for items with hold requests](#).

To prevent holds from being placed on a specific item, see [Restrict holds on specific items](#).

To allow patrons to place multiple holds at once from Polaris PowerPAC working or saved title lists, see the Public Access Administration PDF Guide, Bulk Hold Requests from Polaris PowerPAC Title Lists.

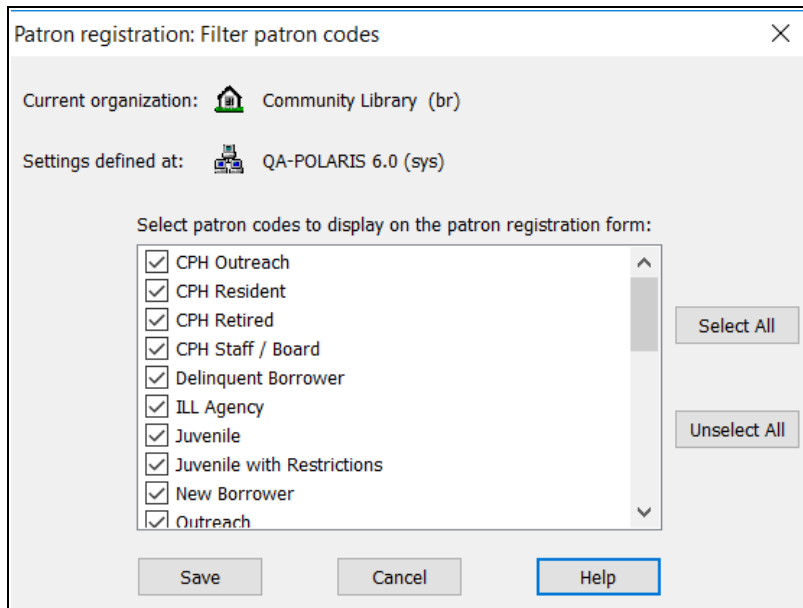
### **Filter Patron Codes for Specific Organizations**

The patron codes available for use in a patron record are based on the settings for the patron's registered branch.

To filter patron codes for use by specific organizations:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Patron registration: Filter patron codes**.

The Patron registration: Filter patron codes dialog box opens. The list of patron codes are those defined in the Patron Codes policy table. For more information, see [Add a Patron Code](#). When a new code is added to that table, it is added to the Filter dialog box and is selected for use by default.

**Note:**

The organization icons at the top of the dialog box indicate whether the settings have been inherited. Initially they are inherited from the system-level settings. Once you change settings at the branch level, they are no longer inherited from the system, even if the system settings are changed.

3. Check or uncheck the codes until the checked items reflect those you want to offer as patron code choices for this organization.
4. Click **Save**. If you have unchecked patron codes, they are removed from the list of patron codes available on workforms for this organization. If an unchecked code is in use, a message informs you of the number of patron records that use the code at this organization and any descendant organizations. You can continue to save or cancel the operation.

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## Setting Up User-Defined Fields

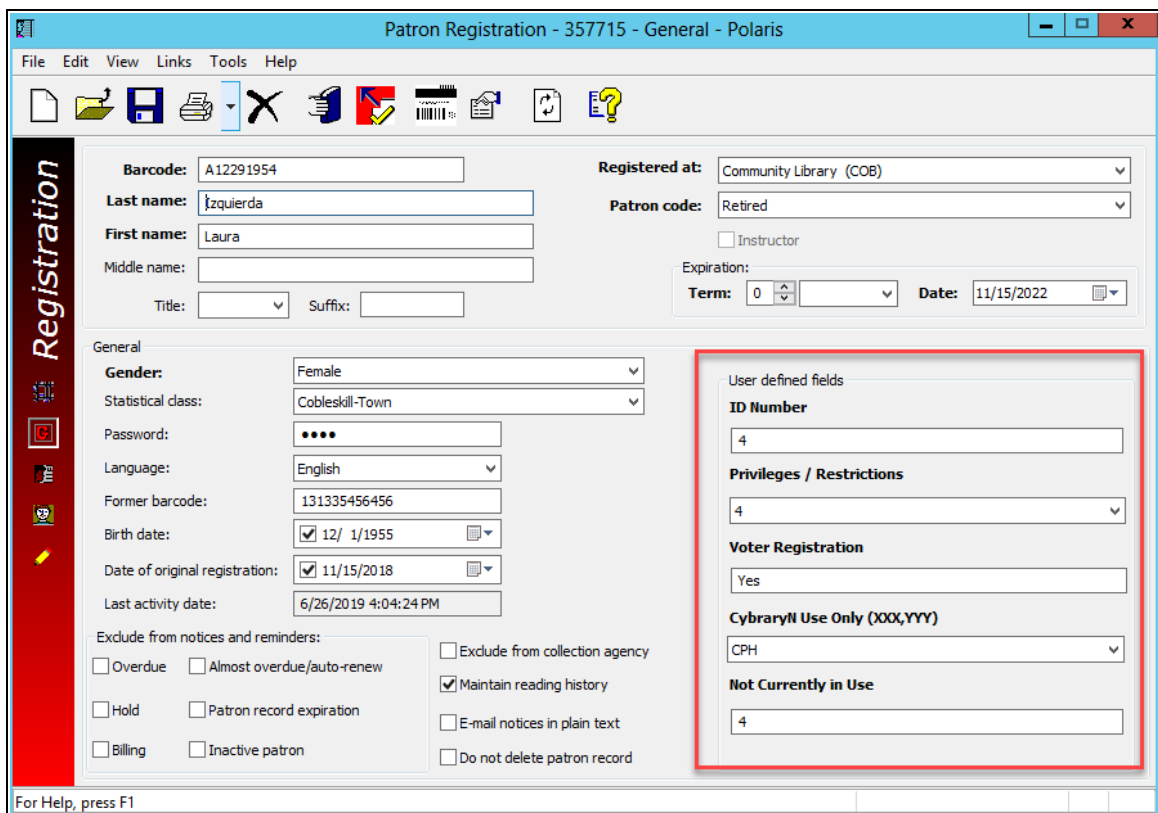
Your patron records can include up to five user-defined fields (UDFs). All five are searchable with the Polaris Find Tool. UDFs can be used for additional identification purposes and as criteria for detecting duplicate patron records.

**Note:**

Your library may allow users to log on to PAC using network credentials

instead of the Polaris patron barcode or username and password. If so, a UDF should be defined for the patron’s network username. For details, see the Public Access Administration PDF Guide, Set Up PAC Active Directory Log On.

The UDFs are set up when Polaris is implemented. At the system level, you can define UDFs as free-text fields where staff members type text, or as drop-menu options. If you define UDFs as drop-menu options, they appear in drop-menu list boxes everywhere UDFs can be selected.



Drop-menu option text can be edited, and the options can be deleted provided they are not used in any patron records. Individual branches can specify which drop-menu UDF options to display; determine the order of display; and designate default values to be used during patron registration, express registration, and online registration from the PAC.

**Note:**

If you plan to use collection agency services, you may need a UDF to identify the guardian of a minor patron.

See also:

- [Scanning a Driver's License for Patron Registration](#)
- [View and Convert User-Defined Fields for Patron Records](#)
- [Set Drop-Menu User-Defined Fields for Organizations](#)
- [Setting Up Free Text User-Defined Fields for Use as Alternate IDs](#)

### Scanning a Driver's License for Patron Registration

California libraries can enter information for a new patron in the patron record by scanning the 2D (two dimensional) barcode on a California driver's license or ID.

Normal barcode scanners will not read data from a driver's license. The license data is stored in a 2D format using PDF417 barcode symbology. Polaris has tested and recommends the Datalogic Gryphon GD4430 USB scanner. However, most 2D PDF417 USB wedge-type scanners should work.

**Note:**

This "Driver's License Scan Facility" feature is separately licensed in Polaris.

A free-text Polaris user-defined field must be designated for the driver's license number. By default, Polaris uses UDF 1. If your library uses a different UDF for the driver's license, contact your Polaris Site Manager to change the UDF.

**Note:**

The designated user-defined field must be a free text field. If it is changed to a drop-menu field in Polaris Administration, the registration data is entered appropriately when the driver's license barcode is scanned, but the ID number is not entered in the user-defined field on the patron record.

When the driver's license is scanned during patron registration, the following driver's license information is entered in the appropriate patron record fields:

- Name (Last, First Middle)
- Street address (up to two lines)
- City

- State
- Postal code

**Note:**

The address information is entered in the Home address fields in the Patron Registration workflow.

- Birth date
- License number (entered in the designated user-defined field)

For registration instructions using this method, see the Patron Services PDF Guide, Scan driver's license to enter patron information.

**Technical Notes**

- Before the Gryphon scanner is first used, it must be programmed to add a suffix of **\$** to the driver's license barcode.
- To avoid problems with patron name and address formatting, you must configure the scanner to run in a mode that returns the line feed character, which indicates the end of each field in the driver's license. For the Gryphon 44XX scanner, the correct mode is USB Alternate Keyboard. The image for reconfiguring the Gryphon 44XX scanner is included in the scanner user guide.
- The code requires the file **DriversLicenseParser.js**. When the Polaris staff client is installed, the folder **ProgramData\Polaris\[version]\Scripts** is created. The file **DriversLicenseParser.js** must be placed in the **Scripts** folder.

Contact your Polaris Site Manager for technical assistance.

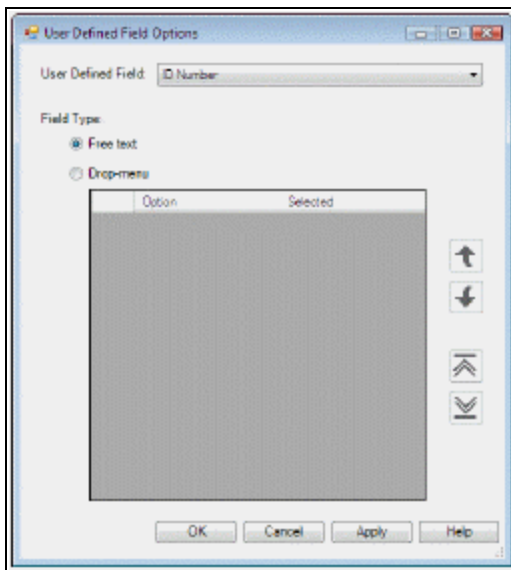
**View and Convert User-Defined Fields for Patron Records**

To view the user-defined fields (UDFs) that have been set up for your Polaris system, set up the options for drop-menu UDFs, and convert UDFs from one type to the other:

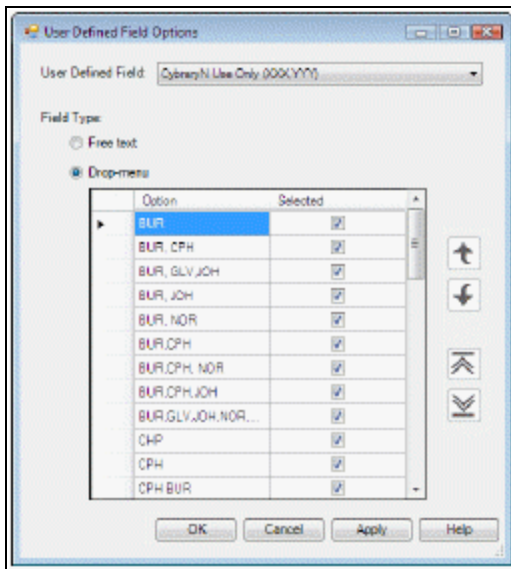
**Note:**

Initial values in drop-menu UDFs are derived from your existing data. You can edit them and add more values if necessary. See the following procedure. When existing text UDFs are converted to drop lists, the options will be available only at branches that have used the corresponding text value.

1. In the Administration Explorer tree view, expand the System folder.
2. Select **Profiles**, and select the **Patron Services** tab.
3. Double-click **Patron registration user defined fields**. The User Defined Field Options dialog box opens.



The **User Defined Field** drop-down list contains the UDFs that were set up at implementation. You can select a UDF to determine if it is defined as free-text or drop-menu on the Patron Registration workform and other appropriate system workforms. Drop-menu UDFs display the possible options defined for them. (Individual branches can select options for use and set the display order. See [Set drop-menu user-defined fields for organizations.](#))



4. To convert a free-text UDF to a drop-menu UDF, follow these steps:
  - a. Select the free-text UDF in the **User Defined Field** list.
  - b. Select **Drop-menu**. All the free-text values currently entered in patron records for this UDF are listed as drop-menu options; by default, all are selected as eligible for use by individual organizations.

**Note:**

If you are converting a free-text UDF with more than 500 unique entries, a message offers you the opportunity to continue or cancel the conversion. Large numbers of values may take some time to convert.

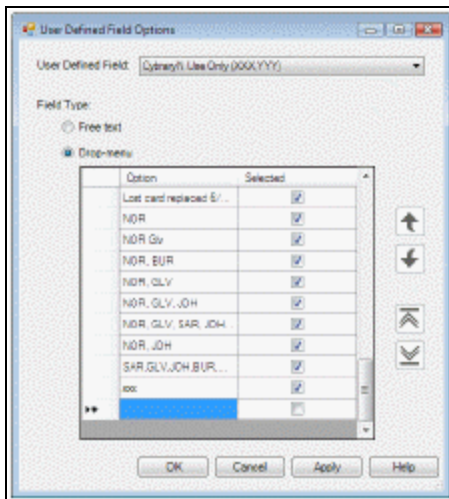
- c. Click **OK**. (You must click **OK** before you modify any of the drop-menu options.)

**Note:**

You can also convert a drop-menu UDF to free text. In this case, all patron records using the options for the drop-menu UDF retain the option text as free-text in the appropriate UDF field.

5. To add an option for a drop-menu UDF, follow these steps:
  - a. Select the drop-menu UDF in the **User Defined Field** list.
  - b. Scroll the list of options to the bottom (blank) entry in the list.





- c. Double-click the blank field and type the new option in the space. You can type up to 64 alpha-numeric characters (letters and numbers).

**Note:**

A drop-menu option cannot be blank except in new records where an option has not yet been chosen or when it is cleared in bulk change. To indicate that no value is selected, set up an option with the text **None**.

- d. Click **Apply**.
6. To edit a drop-menu UDF option, follow these steps:
  - a. Select the drop-menu UDF in the **User Defined Field** list.
  - b. Double-click the option and type the new text over the old.
  - c. Click **Apply**. All patron records and defaults using the old option will be updated with the option's new text.

**Note:**

You can also delete a drop-menu option as long as it is not currently being used in a patron record or as an organizational default setting for the UDF. Simply uncheck the option's **Selected** checkbox.

7. Click **OK** to save your changes and close the dialog box.

**Important:**

If you make any UDF changes, you must log out and log back in to the Polaris staff client to see the effects of your changes in Polaris workforms.

**Related Information**

- Organizational drop-menu UDF options - See [Set drop-menu user-defined fields for organizations](#).
- Organizational default values for UDFs - See Set patron record required fields and default values .
- Minor patrons and collection agency services - Collection agency processing may require a UDF that identifies the guardian of a minor patron. See [Reporting Minors](#).

**Set Drop-Menu User-Defined Fields for Organizations**

After the drop-menu user-defined fields have been set up at the system level, you can set which options will appear in each organization's UDF drop menus and the order in which they should appear.

1. To select drop-menu options for an organization:
2. In the Administration Explorer tree view, expand the organization's folder.
3. Select **Profiles** for the organization, and select the **Patron Services** tab.
4. Double-click Patron registration **user defined fields**. The User Defined Field Options dialog box opens.
5. Select the drop-menu UDF in the **User Defined Field** list. The drop-menu's options are listed.
6. Select or de-select the checkboxes to choose the options you want to appear in the organization's version of the UDF drop menu.



**Note:**


For new UDFs, if an option is selected and saved at the system level, it is selected at all branches. If it is saved as unselected at the system level, it is unselected for all branches.


**Tip:**

First move the de-selected options to the bottom of the list. This may make it easier to move the selected options to the order you want.

7. To change the order in which the options will appear in the organization's UDF

drop menu, highlight an option and select the up arrow  or down arrow .

to move the option up or down in the list. To move an option to the top, click .

To move an option to the bottom, click .

8. Click **OK**.

**Important:**

When you make UDF changes, you must log out and log back in to the Polaris staff client to see the effects of your changes in Polaris workforms.

**Related Information**

- System-level drop-menu UDF options - See [View and convert user-defined fields for patron records](#).
- Organizational default values for UDFs - See [Setting Patron Registration Required Fields and Defaults](#).

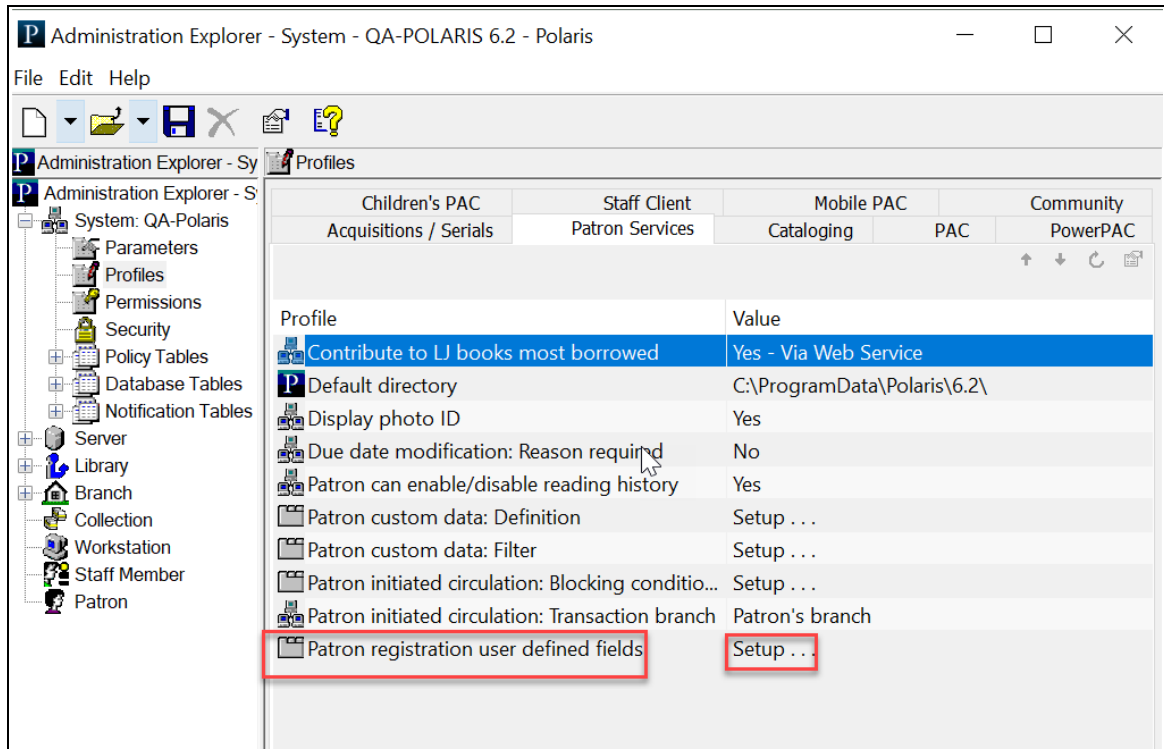
**Setting Up Free Text User-Defined Fields for Use as Alternate IDs**

Use these steps to configure free text **UDF fields** in the patron record to be used as an alternate ID to check out items.

To configure a free text user-defined field for use as an alternate ID:

1. In the **Administration Explorer tree** view, expand the **System** folder, select **Profiles**, and then select the **Patron Services** tab.

2. Select Setup next to **Patron registration user defined fields**.



3. In the **User Defined Field Options** dialog box, select the checkbox **Use as alternate ID for checkout** to indicate that the free text field can be used as an alternate ID to

check out patron items.

User Defined Field Options

User Defined Field: ID Number

Field Type:

Free text

Use as alternate ID for checkout

Only when no barcode match found

Drop-menu

Option	Selected
--------	----------

OK Cancel Apply Help

4. Select **Apply** to save the changes.

The screenshot shows a dialog box titled "User Defined Field Options". At the top, there is a dropdown menu for "User Defined Field" currently set to "ID Number". Below this, the "Field Type" section has two radio buttons: "Free text" (selected) and "Drop-menu". Under "Free text", there are three checkboxes: "Use as alternate ID for checkout" (checked), "Only when no barcode match found" (unchecked), and "Only when no barcode match found" (unchecked). A table with two columns, "Option" and "Selected", is present below the checkboxes. To the right of the table are four arrow buttons for navigation. At the bottom, there are four buttons: "OK", "Cancel", "Apply" (highlighted with a red box), and "Help".

5. (Optional) Select the **Only when no barcode match found** checkbox if you want the patron search to happen only if no matching barcode is found. This checkbox is only enabled when the **Use as alternate ID for checkout** checkbox is checked.

**Note:**

If the Drop-menu option is selected: the field's content will not be affected; the checkboxes will be disabled; and the free text field will be converted to a drop-menu field and cannot be used as an alternate ID.

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## Setting Up Patron Custom Data Fields

You can define up to 10 patron custom data fields in addition to the 5 user defined fields (UDFs). In Polaris Administration, Patron Custom Data Fields (PCDFs) are defined at the System organization level; filtered at the library or branch level; and configured at the branch level to specify required fields or default values for the Patron Registration workflow in the staff client and the PAC self-registration and Update Info pages.

To define the PCDFs for the library system, enter a unique label and define fields. See [Define Patron Custom Data Fields \(PCDFs\)](#). Once these PCDFs have been defined at the System level, you can filter the PCDFs at the branch level so that only the PCDFs your branch wants to use are listed. When a PCDF is selected for the branch organization, it will be available to configure for the Patron Registration workflow in the staff client and for the Self Registration page in the PAC (PowerPAC and Mobile PAC). See [Filter patron codes for specific organizations](#).

When configuring the display of PCDFs for the staff client Patron Registration workflow, you can set default values for custom fields or specify that custom fields are required. See [Setting Patron Registration Required Fields and Defaults](#).

A patron custom data field may be modified or deleted at the System level in Polaris Administration, provided the field is not used in any patron record. See [Modify or delete a PCDF](#).

**Note:**

For information on configuring PCDFs for PAC registration and contact/preferences update forms, see the Public Access Administration Guide, Setting Patron Access Options.

### Define Patron Custom Data Fields (PCDFs)

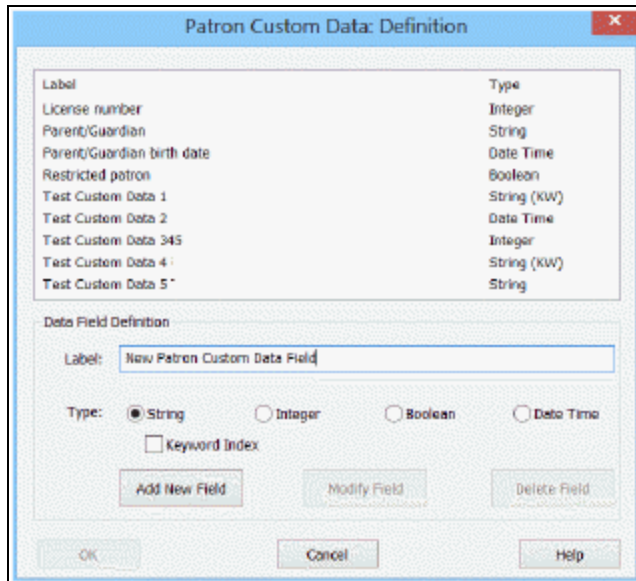
Your library system can define up to 10 PCDFs at the System level in Polaris Administration. After the PCDFs are defined at the system level, the library or branch organization can select which custom fields display in the Patron Registration workflow in the staff client and the Self Registration page in PowerPAC and Mobile PAC.

**Important:**

When you add and save a new PCDF, the PCDF is not available for Find Tool searches until the ERMS daemon is recycled. See your system administrator.

To define PCDFs for the library system:

1. In the Administration Explorer tree view, open the **Profiles** folder at the system level, and select the Patron Services tabbed page in the details view.
2. Double-click **Patron custom data: Definition**. The Patron custom data: Definition dialog box opens.



3. Enter a unique alpha-numeric label in the **Label** field. Each custom data field must have a label that cannot be the same as a label already in use for a custom field or a user-defined field.

**Important:**

If the custom data field is used in any record, the type cannot be changed, but the label text can be modified.

4. Select one of the following field types:
  - **String** - A string type consisting of alpha-numeric and special characters, with a 255-character limit. If **String** is selected, you can select the **Keyword Index** checkbox if you want to include the custom data field in keyword indexing. This checkbox is enabled only when the String field type is enabled.

**Note:**

Selecting the keyword option could adversely affect searching and especially the search suggestion feature. For example, if the library uses



this field for numeric or alphanumeric data, this data can populate a search suggestion with unhelpful data.

- Integer - Consists of numbers only, with a 255 character limit.
  - Boolean - Consists of options to select **Yes** or **No**.
  - Date/ Time - Consists of the date and time.
5. Click **Add New Field** to create a new patron custom data field.

**Note:**

The **Add New Field** button is enabled when a unique label is entered in the **Label** field.

6. Click **OK**. The system displays a message informing you that the ERMS daemon must be recycled. See your system administrator for this step.

### Modify or Delete a PCDF

To modify or delete an existing PCDF:

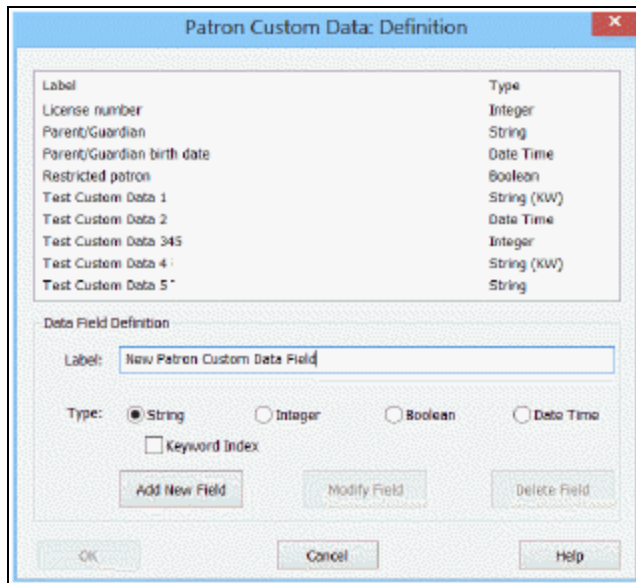
**Note:**

If a PCDF is currently in use in any patron record, it cannot be modified or deleted.

**Note:**

When you modify a PCDF, the modification is not available for Find Tool searches until the ERMS daemon is recycled. See your system administrator.

1. In the Administration Explorer tree view, open the Profiles folder at the system level, and select the Patron Services tabbed page in the details view.
2. Double-click **Patron custom data: Definition**. The Patron custom data: Definition dialog box opens.



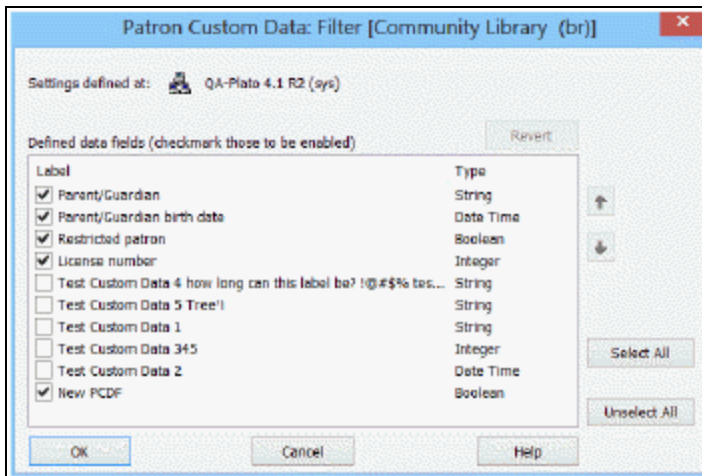
3. Select a field that is not currently used in any patron records.
4. Modify or delete the PCDF as follows:
  - To modify the PCDF, click **Modify Field** and make changes.
  - To delete the PCDF, click **Delete Field**.

The PCDF is modified or deleted. The system displays a message informing you that the ERMS daemon must be recycled. See your system administrator for this step.

### Filter Patron Custom Data Fields

To filter patron custom data fields:

1. In the Administration Explorer tree view, open the Profiles folder at the system, library, or branch level and select the Patron Services tab.
2. Double-click **Patron custom data: Filter**. The Patron custom data filter dialog box opens.



3. Select the checkbox next to the PCDFs that you want to make available for your library or branch organization, and clear the checkbox next to the PCDFs that you do not want to be available for your branch or library organization.
4. To change the order in which the fields will be displayed, select the up or down

arrow button.



**Note:**

If you are filtering the custom data fields at the library or branch level, you can select **Revert** to allow the current settings to be replaced by the settings from the organization above (System if at the Library level; System or Library if at the Branch level).

If changes are made after **Revert** is selected, then saving the changes overwrites the settings for the current organization.

5. Click **OK**. The list of PCDFs is updated for your organization.

To require PCDFs or set defaults, see [Setting Patron Registration Required Fields and Defaults](#).

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## Setting Patron Registration Required Fields and Defaults

When you register a new patron, required fields appear in bold text on the Patron Registration workform. If your library has configured default values for patron record fields, they appear automatically.

Two Patron Services parameters let you configure required fields and default values for patron records:

- Patron registration options - Sets default values for patron records and defines most required fields.
- Patron registration: First name required - Determines whether the first name is required to save a patron record.

Both parameters are available at the System, Library, and Branch levels in Polaris Administration (staff client).

To configure the Patron registration options parameter

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tab.
2. Double-click **Patron registration options**. The Patron Registration Options dialog box - General Defaults tabbed page appears.
3. In the **Registered at** box, select a library branch.

If you do not select a branch, the patron registration workflow defaults to the workstation branch.

4. Select a code in the **Patron Code** box.

**Note:**

Patron codes are used to define available services, loan periods, fines, and limits for specific classes of patrons. The available patron codes are set in the Patron Codes policy table. See [Defining Patron Codes](#).

5. Select a class in the **Statistical Class** box. The **Statistical Class** box lists the defined classes for the selected branch.

**Note:**

Statistical class codes are used for reporting purposes. The available codes are set in the Patron Statistical Class Codes policy table. See [Defining Patron Statistical Codes](#).

6. Select a language in the **Language** box.

This setting controls the default selection in a new patron record. If you have purchased Polaris licenses for additional languages, you can enable multi-lingual

notices and have the notice sent in the language specified in the patron record. Search the Polaris help for "Delivering Notices by Phone (Outbound Telephony)."

**Note:**

If you need additional language selections for patron records, contact your Polaris Site Manager.

7. Select a default method for notifying patrons in the **Notification** box.

This setting controls the default selection in a new patron record. When you set up notification, you can specify the notification method for each specific notice type, including patron preference. In this case, the notice is sent by the method specified in the patron record unless your library chooses to override the preference for certain types of notices. Search the Polaris help for "Delivering Notices by Phone (Outbound Telephony)."

8. If you plan to send email notices of any kind to patrons, and want to send these as plain text by default, select **E-mail notices in plain text**.

This setting controls the default selection in a new patron record. Individual patron records can set that patron's preference for plain text or HTML email notices.

9. If you plan to offer eReceipts as an option to patrons who prefer these to printed receipts, and you want to set one or both of these options by default in new patron records, select **E-mail receipts**, **TXT receipts**, or both.

If you select both options, the default patron record setting for eReceipts is **ALL**; that is, the patron would receive both email and TXT receipts. For more information about eReceipts, see [Setting Up eReceipts](#).

10. Type an area code (three digits) in the **Phone 1 Area Code** box.

11. Use one of the following methods to set an expiration term. This is the time that the patron's registration expires:

- To set a precise date, select **exact date** in the second **Expiration term** box, and type a date in the first box using the format mm/dd/yyyy.
- To set a date relative to the current date (such as two years from today), select **months** or **years** in the second **Expiration term** box, and type a number in the first box.

**Note:**

Your library may choose to block the patron record when the expiration date is in the past. See [Add, select, and order patron block descriptions](#). When the term is updated, the block is removed. See the *Patron Services Guide*, "Updating Patron Registration Check Dates."

12. Use one of the following methods to set an address term. This is the time that the patron's address should be checked:
  - To set a precise date, select **exact date** in the second **Address check term** box, and type a date in the first box using the format mm/dd/yyyy.
  - To set a date relative to the current date (such as two years from today), select **months** or **years** in the second **Address check term** box, and type a number in the first box.

**Note:**

Your library may choose to block the patron record when the address check date is in the past. See [Add, select, and order patron block descriptions](#). When the term is updated, the block is removed. See the *Patron Services Guide*, "Updating Patron Registration Check Dates."

13. Select a country in the second **Postal Code** box, if necessary.
14. Type a postal code in the first **Postal Code** box.

This setting controls the default values in the **Postal Code**, **City**, **State/province**, and **County** boxes on the Add/Edit Address dialog box for patron records. If the state is not required as part of the address, you can leave the state empty.

15. Select the **Required Fields** tab and do the following to specify additional fields that are required when registering patrons:

**Note:**

These fields are always required in new patron records: **Barcode**; **Last name**; **First name**; **Registered at**; **Patron code**; **Expiration term/date**; **Address check term/date**; **Notification option** and

corresponding notification field (for example, **Phone 1** and the telephone number).

- a. Select the checkbox next to each additional field (**Address, Birth date, Gender, Password, Statistical class**) that you want to require for creating patron records. These settings do not apply to offline registration and are not checked when patron records are bulk-changed or merged.

**Notes:**

- When the **Gender** option is selected for the patron's registration branch, the staff member must select the patron's gender from a drop down menu during patron registration. If **None** is selected, a message is displayed when the staff member attempts to save the record. The field label appears in bold to indicate it is required.
- Innovative recommends requiring the Birth date field if your library wants to restrict checkouts and holds based on the patron's age. See "Using Age-Related Loan Policies" in the Leap documentation for more information.

- b. To allow patrons to proceed through the self-registration without selecting a gender, select **Suppress gender selection**.
- c. To include a verification block on all patrons who self-register in the PAC, Mobile PAC, or Polaris API, select **Patron self-registration block**.
- d. To require a duplicate detection check on a patron's information during self-registration, select **Perform Duplicate Detection**. To disable duplicate detection on patron information entered in PowerPAC, MobilePAC, or Polaris API, clear **Perform Duplicate Detection**.

**Note:**

To completely disable duplicate detection on patron information entered in PowerPAC, MobilePAC, or Polaris API, ensure the following option is also cleared:

- i. Open the Polaris Administration Explorer, and select **Parameters > Patron Services > Duplicate Detection**

**Options.**

ii. Ensure the **Name on Identification (First and Last)** > **PAC** option is cleared.

e. Select **Save** to save the additional required fields.

16. If you want to define defaults for user-defined fields (UDFs) or patron custom data fields (PCDFs) or require any of these fields for patron registration, select the **Data Field Defaults** tab, and do the following:

**Note:**

User-defined fields are set up at Polaris implementation, using a Patron Services profile at the System level. See [Setting Up User-Defined Fields](#).

- Select the UDFs subtab to display the UDFs that have been defined for your library organization.
- Select the checkbox next to each UDF that is required for creating patron records.



**Note:**

User-defined fields are set up at Polaris implementation, using a Patron Services profile at the System level. See [Setting Up User-Defined Fields](#).

- For free-text UDFs, type text in each UDF box for which you want to specify default text.
- For drop-menu UDFs, select an option in each UDF drop-menu for which you want to specify a default option.

**Note:**

If you require a drop-menu UDF but do not specify a default option, the field is blank in a new record but the user must select an option.

17. If you want to define defaults for patron custom data fields or make these custom fields required for patron registration, select the Data Field Defaults tab and do the following:

**Note:**

You cannot set default values for dates, and fields with a Boolean type cannot be required.

- Select the Custom Fields subtab.
- Select the label text for the field.

**Note:**

When you select a field, do not select the checkbox unless the field is required to save the patron record.

- To specify defaults for the string, Boolean, or integer field type, do the following:
  - String custom field - When you select a string field type, you can enter a default value of up to 255 characters.
  - Boolean custom field - When you select a Boolean field type, you can select a default value of **Yes**, **No** or **Undefined**. Boolean fields appear as checkboxes in the patron registration forms. If the default is set to

**Yes**, the checkbox is selected. If the default is **No**, the checkbox is not selected.

- Integer custom field - When you select an Integer field type, you can enter a default value of up to 255 numbers in the box.
- d. After defining the default for a field, select **Set Default**.
  - e. To require a value in the field, select the checkbox.
  - f. Select **Apply**.
18. On the Patron Registration Options dialog box, select **Save**.

To configure the Patron registration: First name required parameter

Some patrons have a single name instead of a first and last name. To enable saving a patron record with a single name, set the Patron registration: First name required parameter to No.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tab.
2. Double-click the **Patron registration: First name required** row, and select **Yes** or **No**.
3. Select **Save**.

#### Related Information

- **Default patron passwords** - A step in the nightly Patron Processing SQL job can assign the last four digits of the patron's primary telephone number (**Phone 1**) to the password field of the patron record if a password does not exist. The default password step is disabled at installation; , contact your Polaris Site Manager to activate this feature. For more information about patron passwords, see the *Patron Services Guide*, "Patron Passwords and User Names."
- **Express registration** - You can set separate defaults and required fields for express registration at check-out. See [Setting Express Registration Defaults and Requirements](#).
- **Online registration from PAC** - You can allow patrons to register online from the PAC, and set a birth date requirement and default values for online registration. See the *Public Access Administration Guide*, "Set up online patron self-registration."

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## Setting Express Registration Defaults and Requirements

The Patron Services parameter **Express patron registration options** controls the required fields and default values for express patron registration at check-out. These requirements and defaults can be different from those used for ordinary registrations. When a staff member express-registers a patron, the Express Registration workflow opens with the default values, and required fields are displayed in bold type. The parameter is available at the system, library, and branch levels.

See also: [Set express registration default values and required fields](#)

### Set Express Registration Default Values and Required Fields

To set required fields and default values for express registration:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Express patron registration options**. The Express Patron Registration Options dialog box, General Defaults tabbed page appears. You can set default values for any or all fields on the Express Patron Registration Options dialog box.
3. Select the **Enable Express Registration** checkbox to allow staff with the appropriate permission to express-register patrons. All boxes on the dialog box become available for editing.
4. Select the **Add block to verify patron** checkbox to add a Verify Patron block to each record created through express registration.

When this option is selected, an express-registered patron is blocked at the next check-out. A staff member then verifies details in the patron record and removes the block. See the Patron Services PDF Guide, Resolve a Verify Patron block.

5. Select a code in the **Patron Code** box.

The available patron codes are set in the Patron Codes policy table. See [Defining Patron Codes](#).

6. Select a library branch in the **Registered at** box.

If no branch is selected, the patron registration workflow defaults to the workstation branch.

7. Select a class in the **Statistical Class** box.

The **Statistical Class** box lists the defined classes for the selected branch. See [Defining Patron Statistical Codes](#).

8. Select a language in the **Language** box.

This setting controls the default selection in a new patron record, but another language can be selected at registration.

**Note:**

If you have purchased Polaris licenses for additional languages, you can enable multi-lingual notices and have the notice sent in the language specified in the patron record. Search Polaris help for "Delivering Notices by Phone (Outbound Telephony)."

9. Select a method for notifying patrons in the **Notification** box.

This setting controls the default selection in a new patron record, and the default notification preference for patrons who register online (patron self-registration). However, if the value is set to **None**, the default value for PAC registration will be **Mailing Address** (print). If the value is set to **Fax**, **Telephone 2**, or **Telephone 3**, the default value for PAC registration will be set to Telephone 1 (displayed as **Telephone** in the PAC).

When you set up notification, you can specify the notification method for each specific notice type, including patron preference. In this case, the notice is sent by the method specified in the patron record. Search Polaris help for "Delivering Notices by Phone (Outbound Telephony)."

10. If you plan to send e-mail notices of any kind to patrons, and want to send these as plain text by default, check **E-mail notices in plain text**.

This setting controls the default selection in a new patron record. Individual patron records can set that patron's preference for plain text or HTML e-mail notices.

11. If you plan to offer eReceipts as an option to patrons who prefer these to printed receipts, and you want to set one or both of these options by default in new patron records, check **E-mail receipts**, **TXT receipts**, or both.

If you check both options, the default patron record setting for eReceipts is **ALL**; that is, the patron would receive both e-mail and TXT receipts. For more information about eReceipts, see [Setting Up eReceipts](#).

12. Type a telephone area code (three digits) in the **Voice Phone 1 Area Code** box.
13. Use one of the following methods to set an expiration term. This is the time that the patron's registration expires:
  - To set a precise date, select **exact date** in the second **Expiration term** box, and type a date in the first box using the format mm/dd/yyyy.
  - To set a date relative to the current date (such as two years from today), select **months** or **years** in the second **Expiration term** box, and type a number in the first box.
14. Use one of the following methods to set an address check term. This is the time that the patron's address should be checked:
  - To set a precise date, select **exact date** in the second **Address check term** box, and type a date in the first box using the format mm/dd/yyyy.
  - To set a date relative to the current date (such as two years from today), select **months** or **years** in the second **Address check term** box, and type a number in the first box.
15. Select a country in the second **Postal Code** box, if necessary. If the state is not required as part of the address, you can leave the state empty.
16. Type a postal code in the first **Postal Code** box.
 

This setting controls the default values in the **Postal Code**, **City**, **State/province**, and **County** boxes on the Add/Edit Address dialog box for patron records.
17. On the UDF Defaults tabbed page, select the checkbox next to each UDF that should be a required field for creating patron records.

**Note:**

User-defined fields are set up at Polaris implementation, using a Patron Services profile at the system level. See [Setting Up User-Defined Fields](#).

18. For free-text UDFs, type text in each UDF box for which you want to specify default text.
19. (Optional) For drop-menu UDFs, select a default option.

**Note:**

If you require a drop-menu UDF but do not specify a default option, the field is blank in a new record but the user must select an option.

20. On the Required Fields tabbed page, select the checkbox next to each field (**Address, Birth Date, Gender, Password, Statistical class**) that you want to require for creating patron records.

**Note:**

Innovative recommends requiring the Birth Date field if your library wants to restrict checkouts and holds based on the patron's age. See "Using Age-Related Loan Policies" in the Leap documentation for more information.

21. Click **Save** on the Express Patron Registration Options dialog box.

Related Information

Online registration from PAC - You can allow patrons to register online from the PAC, and set requirements and default values for online registration. See the Public Access Administration PDF Guide, Set up online patron self-registration.

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## Charging for Patron Registration

If your library wants to charge registration fees to certain types of patrons, such as temporary, seasonal, or non-resident users, you can set up registration fees by patron code. The fee is applied automatically when patrons with the specified patron code register or renew their registrations, and their patron accounts are blocked until the fee is paid. Registration fees are applied according to the settings of the registration branch.

See also:

- [Staff Client Workflow](#)
- [Patron Block for Registration Fee](#)
- [Expired Registration](#)
- [Offline Workflow](#)
- [PAC Registration](#)
- [Polaris ExpressCheck](#)
- [Set patron registration fees](#)

## Staff Client Workflow

If a fee has been defined for the patron code, a Registration Fee dialog box appears when a staff member selects **Save** in the new patron record. The dialog box displays the amount of the fee and the following options:

- **Pay** - The staff member must have the permission **Fines: Pay fines at circ** to accept payment for the registration fee. The Pay dialog box opens and displays all current payment methods, including credit card payments if the organization has implemented these. Partial payments are possible. If a fee is partially paid, a block is placed on the patron account (see [Patron Block for Registration Fee](#)). If the option to print a receipt was selected, a receipt prints.
- **Waive** - The staff member must have the permission **Fines: Waive fines at circ**. A waive transaction is written to the patron account, and a receipt prints if the receipt option was selected.
- **Charge** - The charge is written to the patron account. The charge reason is listed as **Registration fee**.
- **Print Receipt** - This option is selected by default. Receipts are printed according to the printer and driver set up for the Check Out workform printer. It is not necessary to check any specific receipt type on the Check-out options dialog box, but the printer and driver must be defined. The information printed on the receipt is that selected for fine receipts with the Patron Services parameter **Fine receipt options**.

## Patron Block for Registration Fee

If the fee is charged to the patron account or only partially paid, a system block (**Patron registration fee**) is placed on the patron account. The block is cleared when the total charge amount is paid. As with other blocks, clicking on the block text from the Patron Blocks dialog box opens the Patron Account view. The permission **Override circ blocks** is required to override the block at check-out.

## Expired Registration

If the expiration date in the patron record is reset (the registration is renewed), and the patron code requires a registration fee, the system displays the Registration fee dialog box as for a new registration. If the patron code is changed to non-chargeable at renewal, the fee dialog box is not displayed.

### Note:

If a new patron record is saved with a chargeable patron code and then

changed to a non-chargeable code, no action is taken on the patron account. If the fee was paid, the payment transaction will remain. If the fee was charged, the charge will remain on the patron account. The registration fee and block remain until staff pay or waive the charge.

### Offline Workflow

If a new patron record is created offline and the patron code is a chargeable type, the fee is charged to the patron account and the **Patron Registration Fee** block is placed on the patron record. The offline upload file includes a note in the entry for the registration.

### PAC Registration

As part of the PAC registration process, the patron selects a home branch. The home branch's default settings are used to create the new patron registration. If the default patron code set for PAC registration is a chargeable code, the program displays a message to the patron. The default message is **Your library account will be charged a [\$] registration fee. Do you want to continue?** The message text can be customized or translated with Polaris WebAdmin (Language Editor).

If the patron chooses to continue, the fee is charged to the patron account and the Patron Registration Fee block is placed on the record.

#### Note:

There is no option to renew an expired patron registration from PAC.

### Polaris ExpressCheck

Patrons can renew an expiring registration at the Polaris ExpressCheck workstation if the option **Permit registration renewal if patron record expires** is selected in the parameter **Polaris ExpressCheck: Enable**. If the patron code is a chargeable type according to the options set for the patron's registered branch, the program displays the message for an expired patron record and does not offer an option to renew. The patron must renew the registration at the circulation desk.

### Set Patron Registration Fees

To specify which patron codes should be charged a registration fee:



1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Registration fee options** to display the Registration Fee Options dialog box.

The dialog box lists the patron codes that have been selected for use at this organization (see [Defining Patron Codes](#)). The default setting for each patron code is \$0.00 (no charge).

3. Select the patron code for which you want to set a fee.
4. Click the charge for the selected patron code and type the new amount in the format shown in the dialog box. You can set a separate fee for each patron code you select.
5. Click **OK**.

---

## Setting Patron Duplicate Detection

When you save a patron record, Polaris automatically checks for duplicate records. By default, Polaris checks the patron name fields (first and last names) for duplicates. Polaris also checks the patron birth date and barcode for matches if this data is in the record. You can set Polaris to check the following additional patron record fields for matching criteria:

- Any two user-defined fields (UDFs)
- Name on Identification
- Phone 1
- E-mail address

A match on any of these optional fields triggers a duplicate detection match. For example, if **Phone 1** is selected, a matching phone number triggers a duplicate detection match, even if the patron names do not match.

**Note:**

The system compares field to field, for example, barcode to barcode. The system does not cross-compare fields to find duplicates. For example, the system does not compare patron name with Name on Identification.

A duplicate is a character-for-character match of the complete field. However, if the field contains only one character, the system does not detect these records as duplicates.

This prevents unnecessary and false duplicate detection in cases where a library has used an asterisk or another single character to flag certain records.

The system also uses the birth date to check for duplicate patron records to distinguish records that might otherwise be considered a match. For example, if there are two patrons named John Smith, a match is only detected if the birth dates are identical as well. If no birth date is supplied, duplicate checking uses only the existing criteria.

**Notes:**

- When a birth date is included in PAC self-registration, the system uses the birth date to check for duplicate patron records, in addition to the first name and last name. If no birth date is supplied, duplicate checking uses only the first and last names. Use the PAC profile **Patron Access options** to require a birth date entry for patron registration from PAC.
- You can opt out of duplicate detection during patron self-registration in PAC using the **Patron Access Options** dialog. For more information, see the Public Access Administration PDF Guide, [Set up online patron self-registration](#).

When possible duplicate records are detected, the Duplicate Patrons dialog displays a list of the possible duplicates. To conserve system resources, the list is limited to 500 entries per duplicate detection criterion. For example, if 1,000 patrons have the same email address and 30 have the same phone number, Polaris lists 530 possible duplicate records.

Use the Patron Services parameter **Duplication detection options** to select one or more of the optional duplicate-checking fields. This parameter is available at the system, library, and branch level. The system uses the registration library's settings.

See also: [Set optional patron duplicate detection fields](#)

### **Set Optional Patron Duplicate Detection Fields**

To specify which patron record fields (in addition to the patron name, barcode, and birth date) are checked during duplicate detection:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tab in the details view.

2. Double-click **Duplication detection options** to display the Duplicate Detection Options dialog box.
3. Select the checkboxes for the additional patron record fields that the system should check for matching criteria. You can select a maximum of two user-defined fields (UDFs). There is no selection limit in the other sections.
4. Click **OK** on the Duplicate Detection Options dialog box. The Administration Explorer appears.
5. Select **File > Save** to save your changes.

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## Setting Reading History Options

Your library can save a reading history for a patron's account. In the staff client, this list is displayed on the Patron Status workform - Reader Services view. (The Circulation permission **Patron Status: Display reader services** is required to view a patron's reading history on the Patron Status workform.) When reading histories are enabled for a patron's registered branch, patrons can also view their reading histories by accessing their patron accounts through the PAC. The reading history contains basic information for each item the patron has checked out since the reading history was started.

Use the Patron Services parameter **Reading history** to enable reading histories, set the amount of time an entry remains in the reading history, and set the maximum number of entries that can be retained in the reading history at once. The parameter is available at the system, library, and branch level. After the parameter is set, staff can start reading histories for specific patrons. If reading history is enabled in Polaris Administration, the Reading History view is available on the Patron Registration workform in the Polaris Web App (Leap). See the Patron Services PDF Guide, Working with Reading Histories.

### **Important:**

If your system includes Polaris Outreach Services, reading histories are automatically enabled for outreach services patrons, regardless of the **Reading History** parameter setting. Separate settings control reading history limits for outreach services patrons. See [Set reading history limits for outreach patrons](#). For more information about outreach services workflows, see the Patron Services PDF Guide, Outreach Services Processing.

See also: [Enable reading histories](#)

## Enable Reading Histories

To enable and limit patron reading histories:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Reading history**. The Reading History Setup dialog box appears.
3. Select **Enable reading history** to allow Polaris to save reading histories for patrons. If this option is checked and your library also uses the Polaris Web App (Leap), users can access the Reading History view from the Patron Registration workflow in Leap. If the **Enable reading history** box is unchecked, the view is not available from the Patron Registration workflow in Leap.
4. Specify the length of time (from check-out date to current date) to retain an entry in the Reading History list:
  - a. Type the number of months or years in the first **History length** box.
  - b. Select the unit of time (months or years) in the second **History length** box.
5. In the **Maximum history** box, type the maximum number of items that can be retained at one time in the Reading History list.

### Note:

An entry's creation date in the reading history is usually, but not always, the check-out date. For example, offline uploads may cause some variation. Also, Polaris does not consider the exact time of check-out. If the **Maximum history value** is exceeded, and several items were checked out on the same date, Polaris deletes the items from the reading history in an unspecified order.

6. Click **OK** on the Reading History Setup dialog box.
7. Select **File > Save** to save your changes.

### Related Information

- Reading history limits for outreach services patrons - See [Set reading history limits for outreach patrons](#).
- Start and stop histories for specific patrons - See the Patron Services PDF Guide, Working with Reading Histories.
- Allow patrons to start and stop reading histories from the PAC - Set the Patron Services profile **Patron can enable/disable reading history** to **Yes**. This setting

applies when reading histories are enabled for the organization and the patron is not an Outreach Services patron.

- Stop all reading histories - To stop recording all reading histories, clear the **Enable reading history** checkbox on the Reading History Setup dialog box. When the checkbox is cleared, new reading histories cannot be created, and existing histories are not incremented. However, existing individual histories are not cleared. If a reading history is stopped from the patron record, the patron's existing history is cleared.
- Allow staff members to remove items from reading histories - Staff members with the Circulation permission **Reading history: Remove non-ORS patron history entries: Allow** can remove individual items from the reading histories of non-outreach services patrons. Staff members with the Circulation permission **Reading history: Remove ORS patron history entries: Allow** can remove individual items from the reading histories of outreach services patrons. See the Patron Services PDF Guide, Working with Reading Histories.
- Allow patrons to remove individual items from reading histories - Set the PAC profile **Patrons can remove reading history** to **Yes**. The setting affects both PowerPAC and Mobile PAC. The system uses the setting for the patron's registered branch. When a patron removes an item from the reading history, the item is also removed from the reading history list in the staff client (Patron Status workform - Reader Services view).

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## Setting Up Patron Messages

Staff members with the appropriate permissions can post predefined or free-text messages to specific patron accounts. The messages are posted from the Patron Registration workform or posted and managed from the Patron Status workform - Notes view, and patrons can read and delete them from the PAC patron account. In Polaris Administration, you set up the predefined messages, translate them into Polaris PowerPAC licensed languages if necessary, and set an automatic expiration period for patron messages. For instructions, see: [Set up patron messages in Polaris Administration](#).

See also:

- [Patron Messages in the Staff Client and Leap](#)
- [Patron Messages in PAC](#)

### **Patron Messages in the Staff Client and Leap**

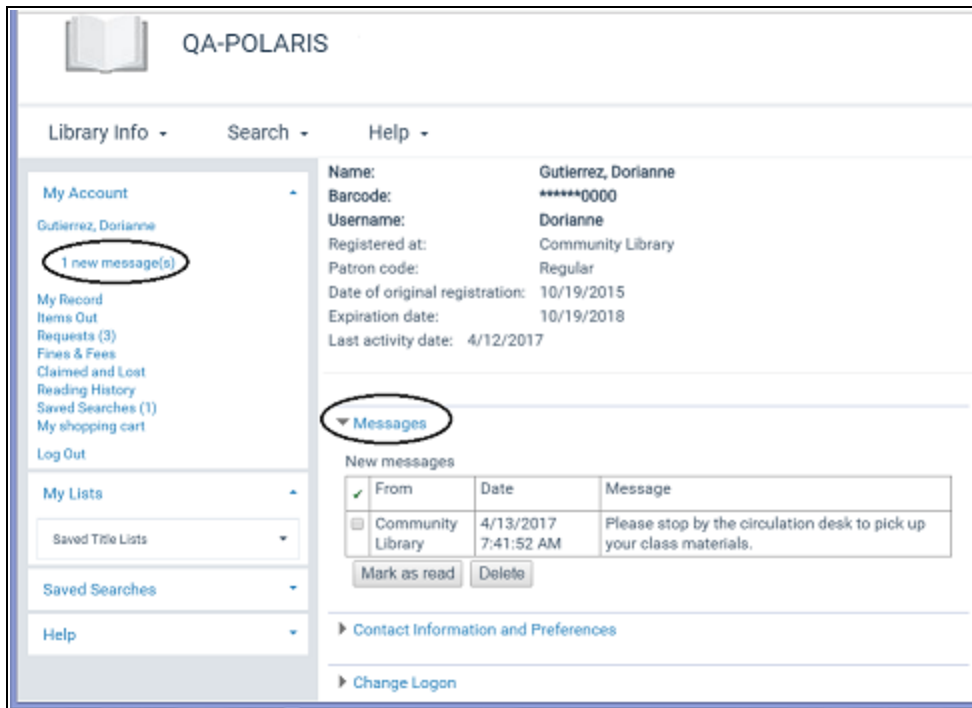
Staff members need the organizational-level Circulation permission **Post patron message: Allow** to post or modify messages in a patron account, and the system-level Circulation permission **Delete patron message: Allow** to delete messages. To post a message from the Patron Registration workflow, select **Tools, Post Message**. To post a message from the Patron Status workflow - Notes view, click **Add Message** in the message area of this view.

If a patron has unread messages, an alert message appears in the Patron Blocks dialog box during check-out. Staff members can continue the check-out operation or cancel it, or click the block text to open the Patron Status workflow - Notes view. The alert message does not place any blocks on patron activity in the PAC.

For detailed staff client procedures, see the Patron Services PDF Guide, Posting Patron Messages.

### **Patron Messages in PAC**

The My Record page in the PAC patron account displays a Messages drawer that the user clicks or taps to expand the Messages area. The side portion of every page of the patron account also displays counts of new and read messages that are convenient links to open the Messages area of the account. When the Messages area is expanded, the patron can check messages and mark them as read or delete them.



When a patron marks a message as read, the status is noted in the Patron Status workform - Notes view in the staff client. When a patron deletes a message, the message is also deleted from the Patron Status workform - Notes view. (Messages are also automatically removed according to the expiration period set in Polaris Administration.)

**Note:**

Patrons can also view their messages in the patron account on SIP self-check workstations if the SIP provider supports this feature. They may also print on the SIP checkout receipt. Messages are shortened to 250 characters if necessary, and they cannot be marked as read or deleted.

### Set up Patron Messages in Polaris Administration

The messages you define in Polaris Administration are available for selection in the **Library assigned** list when a staff member posts a message to a patron account.

To set up patron messages:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.

2. Double-click **Patron message text: Configure**. The Patron Message Text dialog box appears.
3. To add a message, follow these steps:
  - a. Type up to 250 characters in the **Message text** box. Your message can include alpha-numeric and special characters, and URLs.
  - b. Click **Add**. The message is added to the list with an icon that indicates the organizational level at which it was added.

**Note:**

The **Message** list includes all the messages added at the system and parent library levels as well as the branch level. The appropriate organizational icon indicates the level at which the message was added. To add a message from a parent organization for use by your organization, click the message. The text appears in the **Message text** box. Then click **Add**. Only messages defined at your organizational level can be modified or translated.

- c. Click **Apply** to save your changes and continue to work with this dialog box, or click **OK** to save your changes and close the dialog box.
4. To modify an existing message, follow these steps:
  - a. Select the message in the Messages list. The message is displayed in the **Message Text** box.
  - b. Edit the message in the **Message Text** box.
  - c. Click **Modify**. The modified message is placed in the Messages list.
  - d. Click **Apply** to save your changes and continue to work with this dialog box, or click **OK** to save your changes and close the dialog box.
5. To translate an existing message, follow these steps:
  - a. Select the message in the Messages list and click **Translate**. The Language Strings dialog box opens.
  - b. Select a language from the **Choose language** list. The options are the languages licensed for Polaris PowerPAC.
  - c. Type your translation in the language column next to the English equivalent.



- d. To insert a diacritic character, click **Diacritics**. The Character Picker dialog box opens.
  - e. Select a graphic character set, select the character, and click **Insert**. For details on choosing diacritic characters, see the Cataloging PDF Guide, Choose characters/diacritics from a chart. The Character Picker dialog box closes.
  - f. Click **Apply** to save your changes and continue to work with the Patron Message Text dialog box, or click **OK** to save your changes and close the dialog box.
6. To delete a message, follow these steps:
- a. Select the message in the Messages list.
  - b. Click **Delete**.
- If the message is linked to any patron record, a warning message is displayed. You can cancel the deletion or continue to delete the message. If you delete it, it is removed from any patron accounts where it is currently posted.
- c. Click **Apply** to save your changes and continue to work with the Patron Message Text dialog box, or click **OK** to save your changes and close the dialog box.
7. To set an expiration period for patron messages, follow these steps:
- a. Double-click the Patron Services parameter **Patron message text: Expiration period** for the organization.
  - b. Set the number of days (0-99) that a message should remain in a patron account (unless it is manually deleted).

After a message has been posted for the time period you set, it is automatically deleted.

**Note:**

The time is counted from 11:59 on the day the message is created through 11:59 or after of the final day. (The exact time depends on when the automatic deletion job runs.) For example, if the time limit is 5 days, a message created at 2:00 p.m. on Monday will expire at or after 11:59 p.m. Saturday. The

period is not affected if the message text is modified. However, if the expiration period is changed, all messages are immediately affected. For example, reducing the expiration period may cause some messages to expire immediately and shorten the life of others.

- c. Select **File > Save** from the Administration Explorer menu bar.

#### Related Information

Staff procedures - See the Patron Services PDF Guide, Posting Patron Messages.

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## Setting Up Patron Photos

From the Patron Photo view in the Patron Record workform, staff members can take a photo, replace an old photo with a new one, upload an existing image file, or delete the photo from the patron record. If the workstation is set to display the photo, it also appears on the Check Out workform with the other patron information. (The patron's photo does not appear in the PAC.)

Workstations used to process patron photos require a Windows-compatible webcam and associated software. Follow the installation instructions that accompany the webcam.

#### **Note:**

You cannot install webcam software on a thin client (terminal server environment) or use it via Remote Desktop, so you cannot take new patron pictures by these means. However, if the pictures are loaded from another source or captured on a conventional workstation with webcam software, they are displayed normally in terminal server and Remote Desktop environments.

For information about taking and editing patron photos, see the Patron Services PDF Guide, Working with Patron Photos.

See also:

- [System Administration Settings](#)
- [Importing Photos from an Existing Database](#)
- [Replace the default photo](#)

## System Administration Settings

The Patron Services profile **Display photo ID** controls the display of patron photos in the Patron Record workform and the Check Out workform. It also controls whether patron photographs are displayed in the Patron Registration workform in the Polaris Web App (Leap). The profile is available at the system, library, branch, and workstation levels, and is set to **Yes** by default.

The following system-level Circulation permissions control the ability to work with patron photos in the Patron Photo view of the Patron Registration workform:

- **Modify photo IDs**
- **Delete photo IDs**

The permissions are not automatically granted at installation, so you must specifically assign them or supply a supervisor override. (The permissions do not affect the photo display in the Check Out workform.)

## Importing Photos from an Existing Database

A set of existing patron photos can be imported into Polaris in a batch. Imported or uploaded images are limited to one megabyte (1 MG) each. Contact your Polaris Site Manager for more information.

## Replace the Default Photo

To use a custom image as the default photo instead of the Polaris logo by editing the registry:

1. From the Start menu, select **Run** and type **regedit**. The Registry Editor opens.
2. In the Registry Editor, select **HKEY\_LOCAL\_MACHINE, Software, Polaris, [version], Clients**.
3. Right-click in the Clients pane (right side of the Explorer) and select **New, String Value** from the context menu.
4. Type **PatronDefaultPhoto** in the string value name box and press **ENTER**.
5. Double-click the new string value and type the complete path for your image file in the Edit String dialog box. Then click **OK**.

When you open a patron registration workform, or the Check Out workform without a photo, your custom default image is displayed instead of the Polaris logo.

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## Setting Options for Deleting Patron Records

When a patron record is deleted, it is permanently removed from the Polaris database. You can manually delete patron records (see the Patron Services PDF Guide, Deleting Patron Records ) or you can specify criteria whereby patron records are automatically deleted each night.

With either method, you can specify blocks that prevent certain records from being deleted.

**Note:**

Staff must have the following Circulation permissions to delete patron records and override blocks to deletion: **Patron registration: Delete**, and **Patron registration: Override blocks to delete**.

You can set Polaris to automatically delete patron records that have been inactive for a specified number of days. If you set Polaris to immediately delete unblocked records that meet this criterion, you can also choose to place any blocked records in an exceptions record set. You should regularly review this record set. If you do not want any records to be deleted immediately, set Polaris to place all the records that are candidates for deletion, both blocked and unblocked, in a record set where they can be reviewed. After review, some records may be edited and retained, while others may be manually deleted from within the record set.

**Note:**

Automatic deletion is accomplished through a nightly SQL job, Patron Delete. The job is not enabled by default. For details, see the Polaris Administration PDF Guide, Polaris Permission Groups - Default Permissions Reference.

Records that are blocked from automatic deletion, whether placed in a record set or not, are deleted automatically when the circumstances that prevented deletion no longer exist. System-assigned circulation blocks prevent automatic deletion. Library-assigned or free-text circulation blocks do not prevent automatic deletion.

The Patron Services parameter **Patron delete options** sets the criteria that affect both manual and automatic deletion of patron records. The parameter is available at the system, library, and branch level.

**Note:**

Even when a patron record is manually deleted in the Polaris staff client, it

is not immediately removed from the database. Instead, the barcode is modified and the name, address, e-mail address, and user-defined fields are made blank, and the record is not returned in Find Tool search results. The altered record is then deleted as part of the nightly Patron Processing SQL job. This process optimizes staff client performance, and does not affect the settings, procedures, and conditions for automatically and/or manually deleting patron records described here.

See also:

- [Retaining Financial Information for Deleted Patron Records](#)
- [Set options for deleting patron records](#)
- [Set blocks for patron record deletion](#)

### Retaining Financial Information for Deleted Patron Records

Certain patron account data from deleted patron records is saved in separate database tables for the period specified in the Patron Services parameter **Account transaction deletion**. If an associated item record is also deleted, the item record ID, barcode, title, author, and material type are retained. This process ensures the accuracy of the following reports even when the transacting patron records have been deleted:

- Daily Cash Balance Detail
- Daily Cash Drawer
- Daily Cash Drawer POS
- Billed Patrons
- Fines and Fees
- Fines and Fees Summary
- Non-POS Payments

**Note:**

The Daily Cash Balance Detail, Daily Cash Drawer, and Daily Cash Drawer POS reports can use retrospective data dating back to the beginning of the calendar year during which Polaris 4.0 was installed. The other reports listed here use only data from patron records deleted after Polaris 4.0 was installed. This is because these reports include both charge and payment transactions, and the retrospective data does not include charges.

The saved data is then purged according to the parameter setting in the nightly Patron Processing job. For example, if the setting for **Account transaction deletion** is two years, any data older than two years is purged when the job runs. For more information about setting the **Account transaction deletion parameter**, see [Setting Patron Accounting Options](#). For more information about the cash reports, see the Patron Services PDF Guide, Patron Financial Reports.

### Set Options for Deleting Patron Records

**Important:**

If you plan to place records in a record set for later review and manual deletion, you must set up the record set before you start this procedure. For more information, search the Polaris help for "Creating and Using Record Sets."

To set up automatic patron record deletion:

1. In the **Administration Explorer** tree view, open **System > Parameters > Patron Services**.
2. Double-click **Patron delete options**.  
The Patron Delete Options dialog box appears with the Method tab displayed.
3. To turn off automatic deletion, so that patron records are not deleted automatically under any circumstances, select **None** and go to the [last step](#).

**Note:**

If you click **None**, Polaris does not run automatic processing for patron record deletion.

4. (Optional) If you want Polaris to delete all patron records that are not blocked from deletion, select **Delete automatically**.  
The **Use exceptions record set** check box becomes available.
5. (Optional) If you want Polaris to place blocked records in a record set, do the following steps:
  - a. Select the **Use exceptions record set** check box. The **Existing record set** option is selected indicating that Polaris places blocked records in an existing record set. (The New record set option is not functional.)

- b. Click **Select** to search for and select an existing record set to contain records.
5. If you want Polaris to place all patron records (blocked and unblocked) in a record set for review and manual deletion, select **Write to record set**. The **Existing record set** option is selected indicating that Polaris places all records in an existing record set. (The New record set option is not functional.)
6. If you select **Write to record set**, click **Select** to search for and select the existing record set you want to put records in.
7. If you selected **Delete automatically** or **Write to record set**, click **Criteria** to display the Criteria page. (The Delete based on expiration option is not functional.)
8. In the **Delete if inactive for days** box, enter the number of days a patron's record must be inactive to be automatically deleted.

**Note:**

The **Last Activity Date** field in the patron record tracks patron activity. It is updated if the patron engages with the following applications under the listed circumstances:

- Staff client – when the patron checks out an item, renews an item, checks out an item through quick-circ, makes a claim on an item, or pays a charge.
- PAC – when the patron signs in to their account, places or modifies hold and ILL requests, renews an item online, updates patron information, makes payments, or accesses remote databases that require sign in.
- Polaris ExpressCheck, SIP self-check units – when the patron checks out an item, renews an item, signs in to their account, makes payments, or signs in to time and print management applications.
- Inbound telephony – when the patron accesses account information, renews items, or makes payments on their account.

9. Select **Save** on the Patron Delete Options dialog box.

## Related Information

- Working with patron record sets – Search the Polaris help for "Creating and Using Record Sets" and "Bulk-Changing Patron Records."
- Preventing record deletion – See [Set blocks for patron record deletion](#).
- Purging patron ID information from transactions – See [Removing Patron ID Information from Transaction Files](#).

**Set Blocks for Patron Record Deletion**

To specify when Polaris blocks patron records from automatic or manual deletion:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Patron delete options** to display the Patron Delete Options dialog box, Method tabbed page.
3. Click the **Blocks** tab to display the Blocks tabbed page.
4. Specify the situations that should prevent a record from being deleted:
  - Outstanding charge - Select the **Block if the last outstanding charge date is greater than days** checkbox, and type the number of days.
  - Account balance - Select the **Block if the account balance due is over** checkbox, and type the amount.
  - Credit balance - Select the **Block if the account has a credit amount over** checkbox, and type the amount.
  - Deposit balance - Select the **Block if the account has a deposit amount over** checkbox, and type the amount.
  - Notes in patron record - Select the **Block if patron has notes** checkbox. This setting applies to both non-blocking and blocking notes.
  - Last activity date - Select the **Block if the patron record Last Activity Date is within the last . . . days** checkbox, and type the number of days. This option blocks manual deletion if the last activity date is within the specified period. It does not apply to automatic deletion.

**Note:**

The **Last Activity Date** field in the patron record tracks patron activity. It is updated in the following circumstances:

–Staff client: item check-out; renewal; quick-circ item check-out; when a



claim is made on an item, when a charge is paid.

- PAC: log-in to patron account; placing and modifying hold and ILL requests; online renewal; patron information updates; payments; access to remote databases that require log-in.
- Polaris ExpressCheck, SIP self-check units: check-out and renewal; patron account access; payments.
- Time and print management applications: log-in.
- Inbound telephony: Access account information and renew items.

5. Click **Save** on the Patron Delete Options dialog box.

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## Setting Patron Accounting Options

Certain Patron Services parameters control what options are available for handling financial transactions in patron accounts:

- **Credit for overpayment** - Controls whether staff members can accept an overpayment on charges and place a credit on the patron's account. The charges are paid, and the credit can then be carried on the account or refunded to the patron.
- **Distributed waives** - Controls whether a specified waived amount can be deducted from every charge on the patron's account. If a particular charge is greater than or equal to the waived amount, the specified waived amount is deducted from the charge. If a charge is less than the specified waived amount, no action is taken.
- **Account transaction deletion** - Controls how long finished transactions are listed in the patron's transaction summary. A deposit or charge transaction is considered finished when the outstanding amount is 0. Your settings for this parameter apply to all patrons registered at the branch. This setting also determines how long some patron account data from deleted patron records is saved for certain financial reports. See [Retaining Financial Information for Deleted Patron Records](#).

These parameters can be set at the system, library, or branch level. At the system level, you can also set Polaris to waive fines automatically at check-out or renewal. You may want to waive fines automatically at check-out for items that are overdue on one patron's account, but "recovered" when the item is being checked out to another patron. At renewal, you can set Polaris to waive the fine on an overdue item if the same patron is renewing the item.

See also:

- [Waive All Option in the Patron Status Workform - Account View](#)
- [Set patron accounting options](#)
- [Set Polaris to waive fines at check-out or renewal](#)

### **Waive All Option in the Patron Status Workform - Account View**

By default, the Waive All icon and shortcut key are available for use in the Patron Status workform - Account view. When the permissioned staff member clicks the icon, all of the patron's fines are waived.

You can choose to make the Waive All icon and shortcut key unavailable for use. In Polaris Administration, set the Patron Services parameter **Waive All displays** to **No**. The parameter is available at the system, library, and branch levels. The system uses the setting of the workstation's logged-on branch.

This setting makes the icon and shortcut key unavailable and prevents staff members from accidentally waiving all fines with a single click.

**Note:**

The **Waive All displays** parameter setting affects only the Waive All icon display and shortcut key function. It does not affect a staff member's permission to waive fines.

### **Set Patron Accounting Options**

To set Polaris to accept patron overpayments as credits, distribute waives, automatically waive fines at check-out or renewal, and limit the transactions listed in the patron's transaction summary:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. To allow credit for overpayment to be carried on patron accounts, double-click **Credit for overpayment**, and select **Yes**.

If this parameter is set to **No**, when an overpayment is accepted, the charge is paid and a message prompts the staff member to refund the difference.

3. To allow a specified amount to be waived from multiple charges, double-click **Distributed waives**, and select **Yes**.

If this parameter is set to **No**, the **Distributed waive** option is not available on the Waive dialog box when a charge is being waived.

4. To limit how long transactions are listed in a patron's transaction summary, follow these steps:
  - a. Double-click **Account transaction deletion**. The Finished Transaction deletion setup dialog box appear.
  - b. Select **Enable finished transaction deletion**.
  - c. Select **years** or **months**, and type the number of years or months that transactions should be retained.

Most finished deposit or charge transactions older than the period you specify will be deleted from patron transaction summaries, including charges for lost/billed items. However, the following transactions remain in the transaction summary, regardless of your setting: payments that have been refunded or credited, including lost-and-paid transactions that were refunded or credited; deposits that have been credited; any transaction associated with a credit; any transactions that occur for patron accounts currently in collection.

**Important:**

After the cut-off date, all completed transactions are removed from the system, including lost-and-paid transactions. Set this parameter to a minimum of one year, for example, if you reimburse patrons for lost-and-paid material when the material is found within a year.

**Note:**

This setting also determines how long some patron account data from deleted patron records is saved for certain financial reports. See [Retaining Financial Information for Deleted Patron Records](#).

5. Click **OK** on the dialog box.
6. Select **File, Save**.

## Related Information

- Permission to create a credit manually - Staff members must have the permission **Create a patron account credit: Allow** to create a credit manually for a patron account. For more information, see [Setting Circulation Permissions](#).

- Permission to distribute a waived amount - If you allow distributed waivers, staff members who set up the waived amount need the permission **Fines: waive fines at circ: Allow**. For more information, see [Setting Circulation Permissions](#).

### Set Polaris to Waive Fines at Check-Out or Renewal

To waive fines automatically when an overdue item is recovered at check-out to another patron, or when a patron renews an overdue item:

1. In the Administration Explorer tree view, open the **Parameters** folder for the system, and select the **Patron Services** tabbed page in the details view.
2. To have Polaris automatically waive fines on items recovered at check-out, double-click **Overdues: Clear fine if recovered at check-out**, and select **Yes**.

If this parameter is set to **No**, the fine remains in the account of the patron who incurred the overdue charge and the item is checked out to the new patron.

3. To have Polaris automatically waive fines on items being renewed, double-click **Overdues: Clear fine if recovered at renewal**, and select **Yes**.

If this parameter is set to **No**, the fine remains in the patron's account when the patron renews the item.

4. Select **File, Save**.

---

### Setting Payment Method Options

When a staff member accepts a payment from a patron, the staff member selects a payment method such as **Cash** or **Check** to describe the payment. Use the Payment Methods policy table to display or suppress the following payment method options for use in the staff client:

- Cash
- Check
- Collection agency
- Credit card
- Credit card - Manual
- Debit card

- Smart card
- Voucher

For example, if you do not use a collection agency, you can suppress this option from display. Additionally, if your library does not have an integrated solution but offers a non-integrated payment option, you can select Credit card - Manual to make this option available in the staff client when taking payments. Libraries that already have an integrated solution will leave the Credit card - Manual option unselected in the Payment Methods table. You can also set the order in which the options are displayed in the payment dialog boxes.

**Note:**

The Credit card - Manual option does not make credit card payments possible from PAC or MPAC.

The payment options you select in the policy table appear in the following situations:

- Pay dialog box - Paying charges from the Patron Status workform - Patron Account view (if the patron account has a credit, **Pay from credit** is an automatic option); paying overdue charges when renewing an item from the Patron Status workform - Items Out view; paying charges when checking in an item; paying overdue charges when renewing an item from the Check Out workform
- Declare lost item dialog box - Paying charges when declaring an item lost from the Patron Status workform - Items Out view
- Create credit dialog box - Creating a credit from the Patron Status workform - Patron Account view (**Collection agency** option does not apply to this situation)
- Create deposit dialog box - Creating a deposit from the Patron Status workform - Patron Account view (**Collection agency** option does not apply to this situation)

Payment methods can be set from the system, library, and branch organization levels in the Administration Explorer. However, you specify the options for each branch. When you open the table at the system level, you can view and change entries for any branch. At the library level, you can view and change entries for the branches associated with the library. At the branch level, you can view and change entries for the selected branch.


**Note:**

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify payment methods table: Allow.**

See also: [Display or suppress payment methods.](#)



## Display or Suppress Payment Methods

To display or suppress payment methods, and set the order in which they are displayed for staff selection:

1. In the Administration Explorer, open the **Policy Tables** folder for the organization, and select **Payment Methods**. The Payment Methods table is displayed in the details view. By default, all payment methods are set to be displayed. The default display order is alphabetical.
2. Select the branch/method combination to display or suppress.
3. Click  to display the Modify Payment Methods dialog box.
4. In the **Selected** box, select **Yes** to display the method as an option, or select **No** to suppress the method from display.

### Note:

Polaris does not currently support debit card payments, and you should suppress this option for all branches. If you accept credit card payments, and your provider processes debit cards as credit cards, staff members should select **Credit card** or **Credit card - Manual** as the method for a debit card payment.

5. Click **OK** on the dialog box.
6. To set the display order of the payment methods, select a branch/payment method and click the up arrow  to move the option higher in the list, or click the down arrow  to move it lower in the list.  
Your changes affect all the dialog boxes that display the payment methods for that branch.
7. Select **File > Save** to save your changes.

### Related Information

- Set fine amounts - See [Setting Fine Amounts](#).
- Credit card transactions - See [Setting Up E-Commerce](#).

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## Date Sources in Patron Records

Dates for transactions in patron records are derived from the server or client workstation when records are added or modified.

**Note:**

For more information about time and locale consistency among servers and workstations, see the Polaris Administration PDF Guide, [Ensuring Locale and Time Consistency](#).

See also:

- [Creating Patron Records Online](#)
- [Creating Patron Records Offline](#)
- [Modifying a Patron Record from Patron Registration Workform \(Online Only\)](#)

### Creating Patron Records Online

- The registration date defaults to the server date in the Patron Registration workform. (The expiration date and address expiration date are calculated from this date.)
- The creation date in the patron record properties sheet uses the server date.
- The transaction date for a patron registration fee is the server date.
- TransactionHeaders.TranClientDate uses the server date when the creation transaction is queued.
- TransactionHeaders.TransactionDate uses the server date when the creation transaction is processed from the queue.
- In TransactionDetails, where the TransactionSubTypeID is 187 (Patron Registration Date), the value is the client workstation date.

### Creating Patron Records Offline

- The registration date defaults to the offline workstation date in the Patron Registration workform. (The expiration date and address expiration date are calculated from this date.)
- The creation date in the patron record properties sheet uses the offline workstation date.
- The transaction date for a patron registration fee is the offline workstation date.

- TransactionHeaders.TranClientDate uses the offline workstation date when the creation transaction is queued.
- TransactionHeaders.TransactionDate uses the server date when the creation transaction is processed from the queue.
- In TransactionDetails, where the TransactionSubTypeID is 187 (Patron Registration Date), the value is the offline workstation date.

### Modifying a Patron Record from Patron Registration Workform (Online Only)

- TransactionHeaders.TranClientDate uses the server date when the modification transaction is queued.

### Deleting a Patron Record (Online Only)

- TransactionHeaders.TranClientDate uses the server date when the deletion transaction is queued.

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## Removing Patron ID Information from Transaction Files

Polaris records system transactions in transaction log files that are used for reporting, trouble-shooting, and system tracking purposes. Many circulation and patron accounting transactions are associated with specific patrons, and the log files that record these transactions store the specific patron IDs associated with the transactions. Using the Patron Services parameter **Remove patron ID from circ transactions**, you can purge this patron-specific information from your transaction records after a time period you specify. The same settings also purge patron IDs from item record histories. A nightly SQL job, PurgePatronIDFromCircTransactions, purges the patron IDs from the transactions according to your settings.

**Important:**

Patron IDs are not removed from transactions generated by the system unless this feature is enabled at the system level.

See also:

- [Circ Transactions from Which Patron IDs Are Purged](#)
- [Remove Patron ID Report](#)
- [Set up patron identification purging](#)



### Circ Transactions from Which Patron IDs Are Purged

The table lists the transactions from which patron IDs are purged if you choose to enable this feature.

**Note:**

The obsolete transaction IDs listed in the table are no longer used but may still exist in your transaction records.

Transaction Type ID	Transaction Description
2011	OBSOLETE: Renewal Overdue Block
2012	OBSOLETE: Renewal Overdue Block Override
2090	OBSOLETE: Add hold request
2091	OBSOLETE: Reactivate hold request
2092	OBSOLETE: Cancel hold request
2093	OBSOLETE: Satisfy hold request
2094	OBSOLETE: Ship item for hold
2095	OBSOLETE: Receive item for hold
2096	OBSOLETE: Deny item for hold
2097	OBSOLETE: Bibliographic hold
2098	OBSOLETE: Serial issue hold
2099	OBSOLETE: Item specific hold

Transaction Type ID	Transaction Description
2111	OBSOLETE: Trap item for hold
2112	OBSOLETE: Trap hold renew cancelled
2150	OBSOLETE: Patron check out or renewal block
2183	OBSOLETE: Claim block
2185	OBSOLETE: Claim cancelled
2186	OBSOLETE: Claim block
2187	OBSOLETE: Claim block override
6001	Check out
6002	Check in
6005	Hold request created
6006	Holds become held (item received for hold request)
6007	Holds become expired
6008	Holds become unclaimed
6009	Holds become denied
6010	Holds become pending
6011	Holds become not supplied
6012	Holds become shipped
6013	Holds become cancelled
6026	Item claimed lost
6027	Item claimed never had

Transaction Type ID	Transaction Description
6028	Item claimed returned
6033	ILL Request created
6034	ILL Request become active
6035	ILL Request received
6036	ILL Request returned
6037	ILL Request become cancelled
6039	Hold satisfied (item checked out to patron)
6049	Patron accounting auto waive void
7000	eCommerce Payment

### Remove Patron ID Report

When you enable patron ID purging, you can run a report to track the number of patron IDs purged during a time period you specify. Select **Utilities, Reports and Notices** from the Polaris Shortcut bar, select **Circulation** in the Polaris Reports dialog box, and double-click **Remove Patron ID from circ transactions process log**. For more information, search the Polaris help for Circulation Reports.

### Set up Patron Identification Purging

To enable automatic purging of patron identification information from transaction logs and item record histories after a specified time period:

**Note:**

These settings are available at the system, library, and branch levels. Patron identification information is removed from transactions and item record histories according to the transacting branch's settings (not according to the settings of the patrons' registered branches). The transacting branch is identified in the transaction header

**OrganizationID** field. Patron IDs are not removed from transactions generated by the system unless this feature is enabled at the system level

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Patron Services** tab in the details view.
2. Double-click **Remove patron ID from circ transactions**. The Remove patron ID from circ transactions dialog box opens.
3. Select **Enable patron ID removal**. The **Term** options become available.
4. Select an interval or select a date:
  - Select **months, years, or days** in the **Term** box, and set the appropriate number. For example, if you set the term to **2 years**, patron identification information is kept for two years following the date of the transaction, then purged from the transaction database and item record histories. The program identifies transactions from which to remove patron information by counting back the number of days starting from beginning of the day it runs (12:00 midnight) through the final day (12:00 midnight).

**Example:**

The term is set to 30 days. When the program runs on the night of August 30, it will count back from midnight August 30 through the full day to midnight July 31. The patron ID will be removed from all transactions prior to 12:00 July 31.

- Select **exact date**, and type a date or select a date from the drop-down calendar. Information for that date will be purged. This option is most useful for testing or implementing the purge feature for a short period of time.

**Important:**

Automatic lost item recovery actions, which take action on the patron account if a lost item is recovered within a set period of time, depend on the availability of patron ID information. If your organization uses automatic lost item recovery actions, be sure to coordinate the settings so that the patron ID is available if the lost item is recovered within the time period you specify. See [Setting Lost Item Recovery Defaults](#).

5. Click **OK**.

Related Information

Specifying transactions to log - See Polaris Administration PDF Guide, Logging Transactions.

## Setting Up E-Commerce - Overview and Requirements

To submit credit card payments from the Polaris staff client, PowerPAC, ExpressCheck, or Leap, you must establish a connection to a payments gateway and then configure the gateway in Polaris Administration. A license is required for each payments gateway provider.

To accept credit card payments from a staff client, Leap, or ExpressCheck workstation, a credit card reader must be attached to the workstation. When you install Polaris on a workstation where staff will accept credit card payments, the credit card reader option must be selected. You can set up credit card payment processing for the selected e-commerce payment gateway in Polaris Administration at the system, library, or branch level.

To accept PowerPAC or Mobile PAC online payments, you must enable secure socket layer (SSL) for the Web server in Polaris Administration. For PowerPAC, set the SSL: Enable PowerPAC parameter for the Web server to Yes. For Mobile PAC, set the SSL: Enable Mobile PAC parameter for the Web server to Yes. See the Polaris Administration PDF Guide, Setting Web Server Parameters. Patrons must have SSL protocol enabled for their Web browsers and must accept the certificate the first time they log on from outside the library.

The link for paying fines in PowerPAC and Mobile PAC is on the Fines and Fees page in the patron account. If your library is set up to allow online credit card payments from PowerPAC, be sure the PowerPAC and Mobile PAC profiles, Navigation: Fines & fees, are set to Yes for your organization in Polaris Administration.

E-Commerce transactions appear on Polaris financial reports. Search Polaris help for "E-Commerce Credit Card Reports."

For general information regarding e-commerce and Polaris, see these topics:

- [Credit Card Payments from the Staff Client](#)
- [Credit Card Payments from PowerPAC or Mobile PAC](#)
- [Credit Card Payments from Polaris ExpressCheck](#)
- [Privacy and Refund Policy Display Options](#)
- [Credit Card Donations from PowerPAC or Mobile PAC](#)
- [E-Commerce Partial Payments](#)
- [Credit Card Payment Manager](#)

For instructions on setting up one of the e-Commerce gateways that can process credit card payments from the Polaris staff client or Leap, ExpressCheck, PowerPAC, and MobilePAC, see the topic for the gateway your library will use:

**Note:**

EnvisionWare and Comprise are the only payments gateways that handle credit card payments made from Leap.

- [E-Commerce with EnvisionWare®](#)
- [E-Commerce with Comprise™ SmartPAY™](#)
- [E-Commerce with PayPal® Payflow Pro®](#)
- [E-Commerce with Class Point of Sale](#)

For instructions on setting up one of the e-Commerce gateways that processes web payments from PowerPAC and Mobile PAC only, see the topic for the gateway your library will use:

- [E-Commerce with Payments Gateway Secure Web Pay](#)
- [E-Commerce with PayPal Payflow Link](#)
- [E-Commerce with JetPay](#) (PowerPAC only)

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## Credit Card Payments from the Staff Client

The staff member selects the charges in the patron's account, selects **Pay**, and selects **Credit Card** as the payment method. The fine amount is displayed, and the staff member selects **Submit**. The system creates Store Order, Store Transaction, and Store Details entries within the Pending status; sends the request to the e-commerce gateway provider; and sends a query result request to the payment gateway provider. The staff member swipes the credit card through the card reader attached to the workstation. When the credit card is authorized, the system notifies the payment gateway provider that the transaction is finished, the Store Order is updated to a Complete status, the Store Transaction is updated to a Success status, and the patron account is updated. A confirmation message is displayed, and a receipt is generated as with any other payment method.

**Note:**

Staff members require the Fines: Allow credit card payments to accept credit card payments and **Fines: Allow refunds** to process refunds.

Possible error messages:

- Timeout message - The transaction timed out and is canceled.
- Payment did not go through as entered - Transaction is not authorized or is canceled by the gateway.
- Update patron account failed - The patron's credit card was charged, but the patron account was not updated.

For instructions on setting up one of the e-Commerce gateways that can process credit card payments from the Polaris staff client, Leap, ExpressCheck, PowerPAC, and MobilePAC, see the topic for the gateway your library will use:

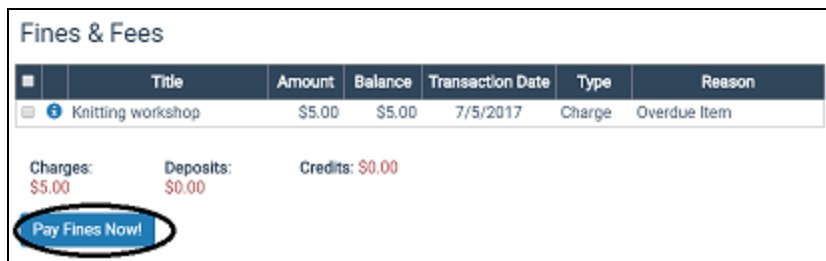
**Note:**

EnvisionWare and Comprise are the only payment gateways for credit card payments from Leap.

- [E-Commerce with EnvisionWare®](#)
- [E-Commerce with Comprise™ SmartPAY™](#)
- [E-Commerce with PayPal® Payflow Pro®](#)
- [E-Commerce with Class Point of Sale](#)

### Credit Card Payments from PowerPAC or Mobile PAC

If both the patron's registered branch and the PAC connection branch are set up with an e-commerce provider to allow credit card payments from PACs, patrons can pay charges from the Fines & Fees view in their library accounts. The patron selects the charges to pay and clicks or taps **Pay fines now**. The example below shows the Fines & Fees view in PowerPAC.





When the transaction is complete, the patron may receive an email receipt, depending on the patron account settings. When a payment is made in the PAC, a note in the Patron Status workform, Account view indicates the payment was made.

For instructions on setting up one of the e-Commerce gateways that can process credit card payments from the Polaris staff client, ExpressCheck, PowerPAC, and MobilePAC, see the topic for the gateway your library will use:

- [E-Commerce with EnvisionWare®](#)
- [E-Commerce with Comprise™ SmartPAY™](#)
- [E-Commerce with PayPal® Payflow Pro®](#)
- [E-Commerce with Class Point of Sale](#)

For instructions on setting up one of the e-Commerce gateways that processes web payments from PowerPAC and Mobile PAC only, see the topic for the gateway your library will use:

- [E-Commerce with Payments Gateway Secure Web Pay](#)
- [E-Commerce with PayPal Payflow Link](#)
- [E-Commerce with JetPay](#) (PowerPAC only)

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## Credit Card Payments from Polaris ExpressCheck

Credit card payments for fines and fees are allowed from Polaris ExpressCheck if both the patron's registered branch allows credit card payments, and the ExpressCheck workstation's branch allows credit card payments. If credit card payments are enabled for ExpressCheck, patrons can log in and submit payments for fines and fees from ExpressCheck workstations that are equipped with a credit card reader. The patron selects the charges to pay on the Fines and Fees page, and selects **Pay fines now**. The patron swipes the credit card through the card reader. When the transaction is complete, the patron may receive an e-mail receipt that lists the charges paid, provided and email address is in the patron record. The Patron Status workform, Account view displays a note that the payment was made through ExpressCheck.

Possible error messages:

- Timeout message - The transaction timed out and is canceled.
- Payment did not go through as entered - Transaction is not authorized or is canceled by the gateway.

- Update patron account failed - The patron's credit card was charged, but the patron account was not updated.

For instructions on setting up one of the e-Commerce gateways that can process credit card payments from the Polaris staff client, ExpressCheck, PowerPAC, and MobilePAC, see the topic for the gateway your library will use:

- [E-Commerce with EnvisionWare®](#)
- [E-Commerce with Comprise™ SmartPAY™](#)
- [E-Commerce with PayPal® Payflow Pro®](#)
- [E-Commerce with Class Point of Sale](#)

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## Privacy and Refund Policy Display Options

When you set up an e-commerce for PowerPAC, MobilePAC, or ExpressCheck, you can select the options: **Display privacy policy** and/or Display refund policy. The text for these display options is set for the patron's registered branch using PolarisWebAdmin (Language Editor) as follows:

- PowerPAC Privacy Policy - You specify your privacy policy text for PowerPAC using Polaris WebAdmin (Language Editor). The message ID is PACML\_PAYMENT\_PRIVACYPOLICY\_1066. The system uses the text specified for the patron's registered branch. For information about editing PAC language files, see the Polaris WebAdmin (Language Editor) Guide or WebAdmin online Help. Any custom text and markup must be responsive to the user's device.
- PowerPAC Refund Policy - You specify your refund policy text for PowerPAC using Polaris WebAdmin (Language Editor). The message ID is: PACML\_PAYMENT\_REFUNDPOLICY\_1067. The system uses the text specified for the patron's registered branch. For information about editing PAC language files, see the Polaris WebAdmin (Language Editor) Guide or WebAdmin online Help. Any custom text and markup must be responsive to the user's device.
- Mobile PAC Privacy Policy - You specify your privacy policy text for Mobile PAC using Polaris WebAdmin (Language Editor). The message ID is MP\_CRUMBS\_FINESANDFEES\_PRIVACY. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the Polaris WebAdmin (Language Editor) Guide or WebAdmin online Help.

- **Mobile PAC Refund Policy**- You specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is MP\_CRUMBS\_FINESANDFEES\_REFUND\_POLICY. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the Polaris WebAdmin (Language Editor) Guide or WebAdmin online Help.
- **ExpressCheck Privacy Policy**- You specify your privacy policy text for ExpressCheck using Polaris WebAdmin (Language Editor). The message ID is EC\_TEXT\_POLICY\_PRIVACY. For information about editing ExpressCheck language strings, see the Polaris WebAdmin (Language Editor) Guide or WebAdmin online help.
- **ExpressCheck Refund Policy** - You specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is EC\_TEXT\_POLICY\_REFUND. For information about editing ExpressCheck language strings, see the Polaris WebAdmin (Language Editor) Guide or WebAdmin online help.

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## Credit Card Donations from PowerPAC or Mobile PAC

When you enable credit card donations from PowerPAC and/or Mobile PAC, the list of receiving organizations is limited to those with credit card processing enabled. When a patron makes a donation, the receiving organization's credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, the donation can be made to that branch only. However, if the PAC connection organization is the library system, and donations are not enabled at the system level, a donation can still be made to any library or branch that accepts donations.

- **Enabling donations** - Use the Credit Card Payment parameter **Online Payments: Configure** for your organization. Select your e-commerce provider in the **Payment processing gateway** list, and select the PowerPAC tab in the Online Payment Settings dialog box. Select **Allow donations**. Repeat using the Mobile PAC tab, if appropriate. For specific instructions, see [Credit Card Payments from PowerPAC or Mobile PAC](#) and select the link for your e-commerce provider.
- **Donation branch order in PAC** - In the PAC, the patron chooses a branch from a list when making a donation. The branch display order is controlled in PAC Administration. See the Public Access Administration PDF Guide, Setting Up Polaris PowerPAC - Overview topic.

- Suppressing a branch from the donation branch list - Use the system-level PAC profile **Suppress branches** to prevent a branch from appearing in the list. For Polaris PowerPAC, this profile also suppresses the selected branches from the connection branch list (**Switch to another branch**), the list of branches on the Search Options scoping page, and the list of branches on the Advanced Search scoping page. For Mobile PAC, the profile suppresses the branch from the drop-down lists on the Library Hours and Preferences pages.

**Important:**

The donation Web part appears in the PowerPAC dashboard when you assign it to the page. Be sure to assign the donation Web part to the pages where you want it to appear. See [Assign Web parts to public pages](#).

To display the donation link in Mobile PAC, set the Mobile PAC profile **Navigation: Donations** to **Yes**.

### Using Google's reCAPTCHA on the PAC Donations Page

Libraries that use PayPal Payflow Pro for credit card payments through Polaris PowerPAC or Mobile PAC can enable Google's free reCAPTCHA feature, which adds human verification to the process of submitting a donation to the library. This minimizes the possibility of a robotic "user" making many small fake donations to the library to verify stolen credit card information. Genuine donors identify a picture or select **I'm not a robot** to continue with the donation process. For more information about reCAPTCHA, see <https://www.google.com/recaptcha/intro/index.html>.

See also:

- [E-Commerce with PayPal® Payflow Pro®](#)
- [Set up Google's reCAPTCHA on the PAC Donations page](#)

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### E-Commerce Partial Payments

Partial payments are supported in the staff client only. Patrons can select specific fines to pay or opt to pay all, but they cannot make partial payments from the PowerPAC, Mobile PAC, or ExpressCheck. The patron's registered branch settings determine the specific credit card processor and parameters. For donations, the selected recipient branch's settings determine the specific credit card parameters.

## Credit Card Payment Manager

Staff members can view transaction details and refund payments made with a credit card using the Credit Card Payment Manager, available from the Utilities menu on the Polaris Shortcut Bar. The system Circulation permission, **Access Credit Card Payments Manager: Allow**, is required to access the Credit Card Payment Manager. The Credit Card Payment Manager shows only those orders and transactions where the staff client workstation's log-on branch and the transacting branch use the same payment gateway.

For more information about using the Credit Card Payment Manager, see [Managing Credit Card Orders](#).

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## Excluding In-House Workstations from Web-Based Payments

To prevent web-based credit card payments from within the library, set the system-level Credit Card Payments parameter **Exclude local workstations from web based payments** to **Yes**. This setting supports a lower level of PCI compliance responsibility on the library's part by preventing web-based payments through EnvisionWare from within the library network. "Local workstations" are those defined in the In-House IP Addresses database table. Add the library's wi-fi connection to the table if you also want to exclude payments from mobile devices within the library.

When you exclude local workstations from web-based payments, the **Pay** option is suppressed from the patron account Fines & Fees page, and the **Donation** link displays a message.

For more information about the In-House IP Address table, see [Identifying In-House Computers](#).

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## E-Commerce with EnvisionWare®

Libraries licensed to use EnvisionWare as the payments gateway for submitting credit card payments can select from the following options in the [Credit Card Payment > Online payments configure parameter](#) in Polaris Administration:

- Enable credit card payments from the PAC (PowerPAC and Mobile PAC) - When this option is selected, patrons can use the EnvisionWare eCommerce Services Self Service application to submit credit card payments from the PAC. The Polaris API is required.
- Enable credit card payments from the staff client or Leap without using EnvisionWare's point of sale (POS) Staff Register software - When this option is selected, staff members can submit credit card payments from the Polaris staff client.
- Enable credit card payments from the staff client using EnvisionWare's Staff Register application - When this option is selected, staff members use the EnvisionWare Staff Register application to submit credit card payments from the Polaris staff client. SIP is required.
- Enable credit card payments from ExpressCheck.

**Note:**

Partial payments can be accepted in the staff client, but not in ExpressCheck. Refunds for credit card payments cannot be processed through EnvisionWare.

See also:

- [Staff Client Credit Card Payments - EnvisionWare](#)
- [ExpressCheck Credit Card Payments - EnvisionWare](#)
- [PAC Payments - EnvisionWare](#)
- [Set up EnvisionWare processing in Polaris Administration](#)

### Staff Client Credit Card Payments - EnvisionWare

In Polaris Administration, your library can set up credit card payments from the staff client using EnvisionWare's Staff Register interface or the Polaris interface. If **Enable**

**ExpressCheck/Staff Client (without POS)** is selected for the library organization, the Polaris credit card payment interface is used. If **Enable Staff Client with POS** is selected for the library organization, the EnvisionWare Staff Register interface is used.

### Staff client credit card payments without EnvisionWare's Staff Register interface

The staff member can pay a patron's charges via EnvisionWare when it is the selected payment gateway for the staff member's log-on branch (see [Set up EnvisionWare processing in Polaris Administration](#)). The system checks whether the payment is an overpayment, which is not allowed, or under the minimal amount set for credit card transactions, and displays appropriate messages to stop the transaction in these cases. Otherwise, the Credit Card Payment dialog box opens.

#### Note:

Entries in the Note field on this dialog box appear on the Polaris Store Order. For information about viewing credit card transactions and "orders," see [Managing Credit Card Orders](#).

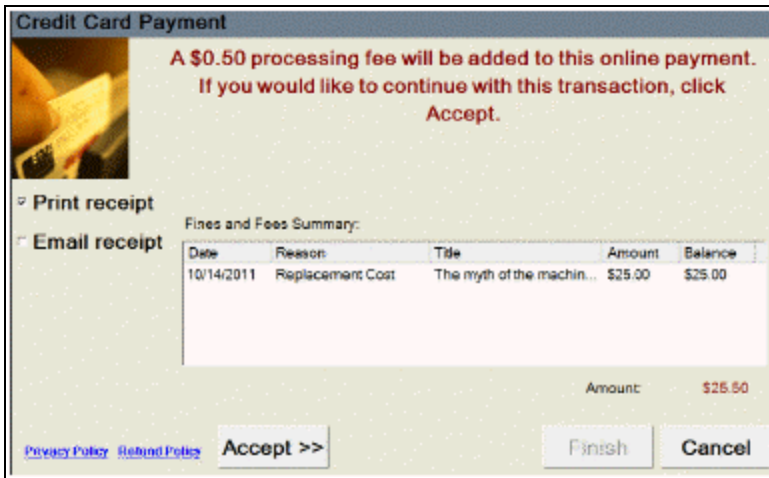
### Staff client credit card payments using EnvisionWare's Staff Register interface

When the option **Enable Staff Client with POS** is selected, the Staff Register application is used to submit payments initiated from the Polaris staff client. Credit card payments can be made from the Patron Status workform, Patron Account view or the Check In workform.

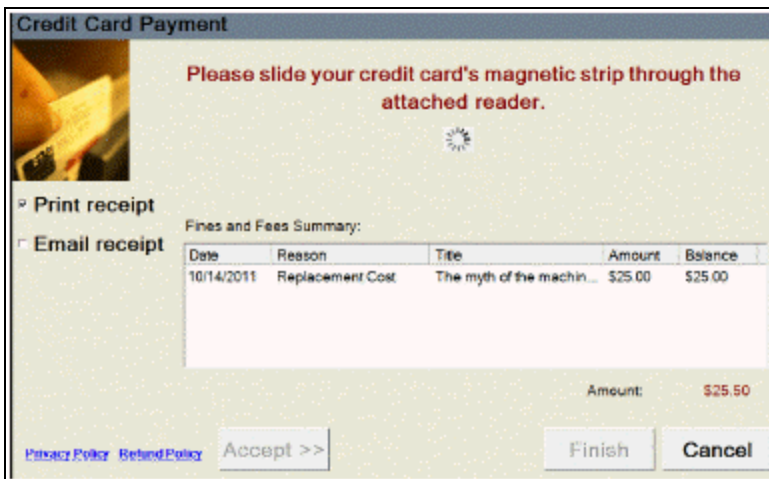
The user selects Pay, and the EnvisionWare Staff Register application opens where the user selects the fines or fees the patron is paying.

### ExpressCheck Credit Card Payments - EnvisionWare

The logged-on ExpressCheck user selects the charges to pay on the patron account Fines & fees page, and selects **Pay**. The confirmation screen is displayed.

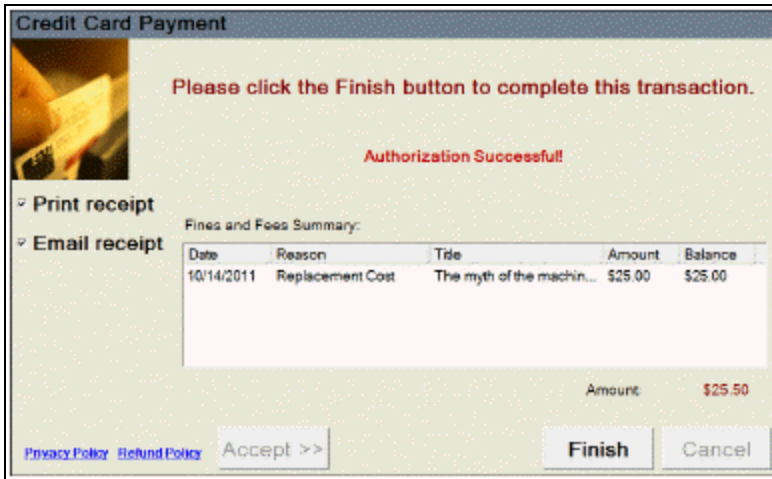


When the user selects **Accept**, the screen instructs the user to swipe the credit card.



The Polaris system creates Store Order, Store Transaction, and Store Details entries with Pending status, sends the request to EnvisionWare, and sends a query result request to EnvisionWare every 5 seconds. When the credit card is swiped and authorized, a success message is displayed and the user selects **Finish**.



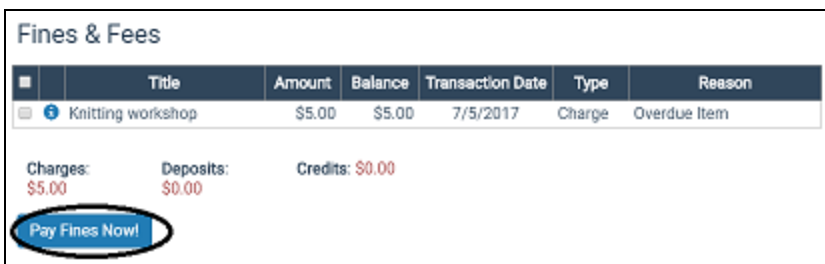


The Polaris system then notifies EnvisionWare the transaction is finished, the ILS Store Order is updated to Complete status, the ILS Store Transaction is updated to Success status, and the patron account is updated. A print or e-mail receipt is generated according to the receipt option the user selected.

### PAC Payments - EnvisionWare

Payments from PowerPAC and Mobile PAC are Web-based, and patrons enter their credit card information by typing it in an online form.

The logged-on patron selects the charges to pay on the patron account Fines & Fees page, and clicks **Pay Fines Now!**. If the library has specified a processing fee, a message is displayed.




The EnvisionWare Self Service application opens displaying the amount owed in the Transaction Options window.


### Transaction Options

**Fines/Fees Owed: \$23.85**

Please select one of the following options.



Pay Fines/Fees



Access Account(s)

[Exit](#)

The patron selects **Pay Fines/Fees**.

The Itemized Fines window displays each charge.

### Itemized Fines

**Fines/Fees Owed: \$23.85**

Please select the fines/fees you would like to pay.

	Description	Amount	Payment
<input checked="" type="checkbox"/>	"Charge" The beggar maid : stories of Flo and Rose	\$8.95	<input type="text" value="8.95"/>
<input checked="" type="checkbox"/>	"Charge" Organic farming : yesterday's and tomorrow's agriculture	\$5.95	<input type="text" value="5.95"/>
<input checked="" type="checkbox"/>	"Charge" Stranger's forest	\$8.95	<input type="text" value="8.95"/>
<a href="#">Check/Uncheck All</a>		<b>Total:</b>	\$23.85

[Back](#)    [Exit](#)    [Submit](#)


The patron selects the checkbox next to each charge to pay, and selects **Submit**.

The Payment Options window opens.


### Payment Options

**You have selected to pay: \$23.85**

Please select one of the following options.



Pay From Credit Card



No funds available in your Library Deposit Account  
Balance: \$0.00

[Back](#)    [Exit](#)

The patron selects **Pay From Credit Card**.

The Credit Card window opens.

The patron enters the credit card information, and selects **Submit**.

**Credit Card**

Please enter your credit card information.

Card Holder Name:

Credit Card Type:

Credit Card Number:

Expiration Date:

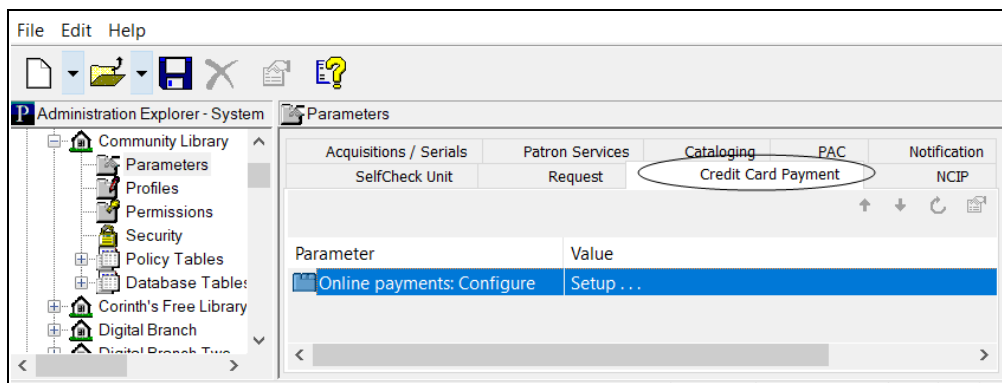
CVC Number: *What is this?*

The patron selects the **Submit** button to submit the payment to EnvisionWare for processing. If the payment is successful, a confirmation is displayed. The patron account is updated in Polaris.

### Set up EnvisionWare Payment Processing in Polaris Administration

To set up Polaris and Leap for EnvisionWare eCommerce payment processing in Polaris Administration:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.



2. Double-click **Online Payments: Configure**.

The Online Payments Settings dialog box opens.

The screenshot shows a dialog box titled "Online Payment Settings". At the top, there is a "Payment processing gateway" dropdown menu with "EnvisionWare" selected and a "Properties" button to its right. Below this, there are four tabs: "PowerPAC", "Staff Client / Leap", "ExpressCheck", and "Mobile PAC". The "Staff Client / Leap" tab is active. Under this tab, there are several settings: a checked checkbox for "Allow online payments", two input fields for "Minimum fine (\$)" (set to \$3.00) and "Processing fee (\$)" (set to \$0.00), a checked checkbox for "Send email receipt", and an unchecked checkbox for "Allow manual credit card data entry if card reader is attached". At the bottom of the dialog box are three buttons: "OK", "Cancel", and "Help".

3. Select **EnvisionWare** in the **Payment processing gateway** list.
4. Click **Properties**.

The EnvisionWare properties dialog box opens.

5. To allow patrons to make credit card payments from the PAC, select **Enable PAC Payments** and enter the following connection information:

- **Payment page URL** - Payment page URL - System level only. Provided by EnvisionWare.
- **PAC Return URL** - Typically the Polaris PowerPAC patron account Fine & Fees page, displayed when the user clicks the return link on the EnvisionWare final payment transaction page (maximum 250 characters, alphanumeric):  
<https://www.mylibrary.org/polaris/patronaccount/finesfees.aspx>, where [www.mylibrary.org/polaris](http://www.mylibrary.org/polaris) is your PAC web site.
- **MPAC Return URL** - Typically the Polaris Mobile PAC patron account Fine & Fees page, displayed when the user clicks the return link on the EnvisionWare final payment transaction page (maximum 250 characters, alphanumeric):  
<https://www.mylibrary.org/mobile/FinesAndFees/UpdateAccount>, where

www.mylibrary.org/mobile is your Mobile PAC web site. This field is required. If you do not use Mobile PAC, simply enter your PAC Return URL.

6. To allow credit card payments from Polaris ExpressCheck units, the Polaris staff client (without using EnvisionWare's Staff Register software), or Leap, select **Enable ExpressCheck/Staff Client (without POS) / Leap** and enter the following connection information:
  - **Payment service URI**
  - **Port number**
  - **Inactivity timeout \_\_\_\_ seconds**
7. To allow credit card payments from the Polaris staff client using EnvisionWare's Staff Register software, select **Enable Staff Client with POS** and enter the following connection information:
  - **Server URL**
  - **Port number**
  - **Timeout \_\_\_\_ minutes**
8. Click **OK** to save the settings, close the properties dialog box, and return to the Online Payment Settings dialog box.
9. Click the **PowerPAC** tab on the Online Payments Settings dialog box, and select **Allow online payments**.

**Note:**

The option **Allow online payments** is available only if you selected **Enable PAC payments** on the EnvisionWare properties dialog box. The other information on this tab is controlled by EnvisionWare's Self Service web application and cannot be edited in Polaris.

The screenshot shows the 'Online Payment Settings' dialog box. At the top, the title is 'Online Payment Settings' with a close button (X). Below the title, there is a section for 'Payment processing gateway' with a dropdown menu set to 'EnvisionWare' and a 'Properties' button. Below this, there are four tabs: 'PowerPAC', 'Staff Client / Leap', 'ExpressCheck', and 'Mobile PAC'. The 'Staff Client / Leap' tab is active. Under this tab, the 'Allow online payments' checkbox is checked. Below it, there are two input fields: 'Minimum fine (\$):' set to '\$1.00' and 'Processing fee (\$):' set to '\$0.00'. There are three unchecked checkboxes: 'Send email receipt', 'Display privacy policy', and 'Display refund policy'. Below these, there is an unchecked checkbox for 'Allow donations' with a 'Processing fee (\$):' input field set to '\$0.00'. At the bottom, there is an unchecked checkbox for 'Allow patron to designate title purchase'. At the very bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

10. Click the **Staff Client / Leap** tab and select Allow online payments.

**Note:**

The option **Allow online payments** is available on the Staff Client tab only if you selected **Enable ExpressCheck/Staff Client (without POS)** or **Enable Staff Client with POS**. The other information can be edited only if you selected **Enable ExpressCheck/Staff Client (without POS)**. If **Enable Staff Client with POS** is selected, EnvisionWare's Staff Register application controls these settings.

Online Payment Settings

Payment processing gateway

EnvisionWare Properties

PowerPAC **Staff Client / Leap** ExpressCheck Mobile PAC

Allow online payments

Minimum fine (\$):

Processing fee (\$):

Send email receipt

Allow manual credit card data entry if card reader is attached

OK Cancel Help

11. If **Enable ExpressCheck/Staff Client (without POS)** is selected in the EnvisionWare properties dialog box, set the payment and receipt options:
  - Enter the minimum fine amount you want to accept by credit card payment in the **Minimum fine** box. The default value is the lowest possible value, \$0.01.
  - To charge a processing fee for fine payments, specify the amount in the **Processing fee** box. The maximum value is \$20.00.
  - To send an email receipt for fine payments, select Send email receipt.
  - To allow staff members to enter credit card numbers manually, select **Allow manual credit card data entry if card reader is attached**.
12. Click the **ExpressCheck** tab on the Online Payments Settings dialog box, and select **Allow online payments**.

**Note:**

The option **Allow online payments** is available only if you selected **Enable**



**ExpressCheck/Staff Client (without POS)** on the EnvisionWare properties dialog box.

Online Payment Settings

Payment processing gateway

EnvisionWare ▼ Properties

PowerPAC Staff Client / Leap **ExpressCheck** Mobile PAC

Allow online payments

Minimum fine (\$):

Processing fee (\$):

Send email receipt

Display privacy policy

Display refund policy

OK Cancel Help

13. Set the payment, receipt, and policy display options for ExpressCheck as follows:
- Set the minimum fine amount you want to accept by credit card payment. The default value is the lowest possible value, \$0.01.
  - To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
  - To send an email receipt to the patron, select **Send email receipt**.
  - To display a privacy policy link in ExpressCheck, select **Display privacy policy**. See [Privacy and Refund Policy Display Options](#).
  - To display a refund policy link in ExpressCheck, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).

- Click the **Mobile PAC** tab on the Online Payments Settings dialog box, and select **Allow online payments**.

**Note:**

The option **Allow online payments** is available only if you selected **Enable PAC payments** on the EnvisionWare properties dialog box. The other information on this tab is controlled by EnvisionWare's Self Service web application and cannot be edited in Polaris.

Online Payment Settings

Payment processing gateway

EnvisionWare Properties

PowerPAC Staff Client / Leap ExpressCheck **Mobile PAC**

Allow online payments

Minimum fine (\$): \$5.00

Processing fee (\$): \$0.00

Send email receipt

Display privacy policy

Display refund policy

Allow donations

Processing fee (\$): \$0.00

Allow patron to designate title purchase

OK Cancel Help

- Click **OK** to save your settings.

---

## E-Commerce with Comprise SmartPAY

Polaris supports e-commerce with Comprise SmartPAY Merchant Service Program (MSP) from Comprise Technologies, Inc., a PCI-compliant hosted payment solution suitable for both Polaris Virtual Private Cloud (Hosted) and Polaris ILS turnkey customers in the United States and Canada. Comprise SmartPAY, which handles authorization requirements, is responsible for PCI compliance. Polaris stores only the last four digits of the credit card number and the store order when payment is made through Comprise SmartPAY. For more information about the Comprise SmartPAY solution, see: [http://www.comprisetechologies.com/?page\\_id=32](http://www.comprisetechologies.com/?page_id=32)

With Comprise SmartPAY MSP, the library can accept credit card and debit card payments made from the Polaris staff client, Leap, Polaris ExpressCheck, Polaris PowerPAC, and Mobile PAC. Comprise SmartPAY uses a single SmartServer linked with your library's Polaris database, and the library will have a single Comprise account for all payment portals. Each staff client and ExpressCheck workstation that will accept credit card payments must have a Comprise SmartTerminal (the SmartPAY card reader device) connected to it.

Refunds must be performed at a staff client workstation with a SmartPAY SmartTerminal device attached. Both the branch that took the payment and the branch issuing the refund must use SmartPAY. The refund transaction is initiated in Polaris, for example from the Patron Account. The user is prompted to swipe the card in the SmartTerminal device. The same card that made the payment must be used. Each refund requires a card swipe. If the user is refunding 3 separate payments, the card must be swiped 3 times.

SmartPAY refunds are issued "per payment," not per charge. For example:

- If 3 charges were paid with a single payment transaction, the total of all 3 can be refunded with a single refund transaction/card swipe.
- If 3 charges were paid with 3 separate payment transactions, then each must be refunded with separate refund transactions—3 card swipes.
- Partial refunds are supported when refunding any payment. If 3 charges were paid with a single transaction, a partial refund of each payment is supported.

- Automatic refunds related to lost item recovery are not supported. Polaris recommends that you disable any Refund option for lost-and-paid recovery when using SmartPAY. If automatic refund is enabled with SmartPay, the payment will be left as is in the patron account. No refund is created.
- Refunds made from the SmartPAY web interface (not using the API from within the Polaris staff client) are not reflected in the patron account and cannot be duplicated in Polaris.

**Note:**

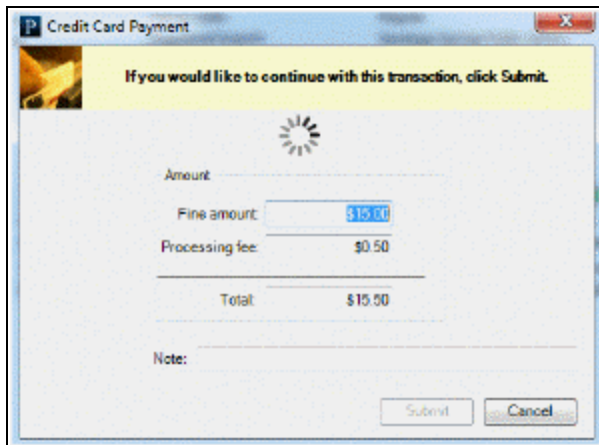
Credit card payments for Polaris Fusion digital materials through SmartPAY are not available at this time.

See also:

- [Staff Client Payments - Comprise SmartPAY](#)
- [ExpressCheck Payments - Comprise SmartPAY](#)
- [PAC Payments - Comprise SmartPAY](#)
- [SmartPAY Staff User Interface](#)
- [Set up Comprise SmartPAY processing in Polaris Administration](#)

**Staff Client Payments - Comprise SmartPAY**

The staff member can pay a patron's charges via Comprise SmartPAY when Comprise SmartPAY is the selected payment gateway for the staff member's log-on branch (see [Set up Comprise SmartPAY processing in Polaris Administration](#)), and a SmartTerminal is connected to the workstation. The system checks whether the payment is an overpayment, which is not allowed, or under the minimal amount set for credit card transactions, and displays appropriate messages to stop the transaction in these cases. Otherwise, the Credit Card Payment dialog box opens.

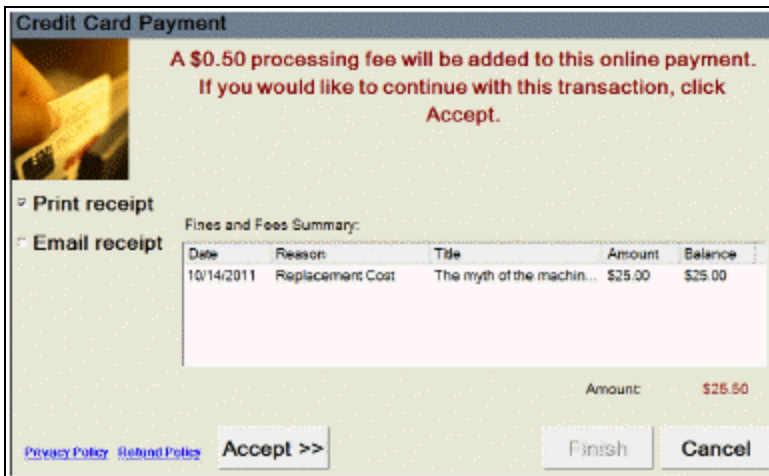
**Note:**

Entries in the Note field on this dialog box appear on the Polaris Store Order. For information about viewing credit card transactions and “orders,” see the Patron Services PDF Guide, Managing Credit Card Orders.

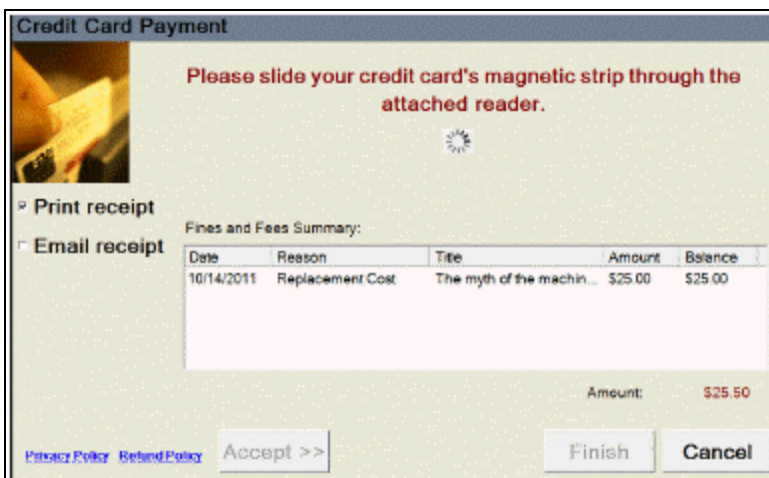
When the staff member clicks **Submit**, the system creates Store Order, Store Transaction, and Store Details entries with Pending status, sends the request to SmartPAY, and sends a query result request to SmartPAY every 5 seconds. When the credit card is swiped at the SmartTerminal device and authorized, the system notifies SmartPAY that the transaction is finished, the ILS Store Order is updated to Complete status and the ILS Store Transaction to Success status, and the patron account is updated. A confirmation message is displayed after a few seconds, and a receipt is generated as with any other payment method.

**ExpressCheck Payments - Comprise SmartPAY**

The ExpressCheck workstation must be equipped with a SmartTerminal card reader. The logged-on ExpressCheck user selects the charges to pay on the patron account Fines & fees page, and selects **Pay**. The confirmation screen is displayed.



When the user selects **Accept**, the screen instructs the user to swipe the credit card at the SmartTerminal device.



The Polaris system creates Store Order, Store Transaction, and Store Details entries with Pending status, sends the request to SmartPAY, and sends a query result request to SmartPAY every 5 seconds. When the credit card is swiped at the SmartTerminal device and authorized, a success message is displayed and the user selects **Finish**.

**Credit Card Payment**

Please click the Finish button to complete this transaction.

Authorization Successful!

Print receipt

Email receipt

Fines and Fees Summary:

Date	Reason	Title	Amount	Balance
10/14/2011	Replacement Cost	The myth of the machin...	\$25.00	\$25.00

Amount: \$25.50

Privacy Policy Refund Policy Accept >> Finish Cancel

The Polaris system then notifies SmartPAY the transaction is finished, the ILS Store Order is updated to Complete status and the ILS Store Transaction to Success status, and the patron account is updated. A print or e-mail receipt is generated according to the receipt option the user selected.

### PAC Payments - Comprise SmartPAY

Payments from PowerPAC and Mobile PAC are Web-based, and patrons enter their credit card information by typing it in an on-screen form.

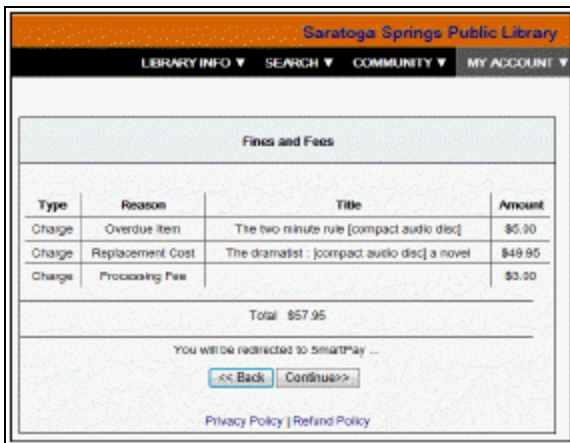
**Note:**

You can prevent Web-based credit card payments from within the library by setting the system-level Credit Card Payments parameter **Exclude local workstations from web based payments** to **Yes**. See [Excluding In-House Workstations from Web-Based Payments](#).

The logged-on PAC user selects the charges to pay on the patron account Fines & Fees page, and clicks **Pay Fines Now**. If the library has specified a processing fee, a message is displayed.



When the user clicks **Accept**, the Fines & Fee summary page is displayed. This page totals the selected charges and processing fee, if any, and informs the user that they will be redirected to SmartPAY.



When the user clicks **Continue**, the SmartPAY checkout page opens.


**Note:**  
 The “time remaining” value on this page is configured by Comprise SmartPAY. The default value is 90 seconds.



The user enters credit card payment information and an e-mail address. SmartPAY will send an e-mail receipt for the payment to the e-mail address specified on this page. When the user clicks **FINISH**, the SmartPAY payment confirmation page is displayed. The ID number on this page is the Polaris patron record ID, and the invoice number is the Polaris Store Order ID.

When the user clicks **Finish**, a printable receipt page is displayed. The library information shown on the e-mail receipt and on this page is specified by Comprise as part of your setup process. The Invoice number is the Polaris Store Order ID, and the Track number is the Comprise transaction ID. The user can click **Print** to print the receipt, or click

**Finish** to return to the Polaris PAC page specified in Polaris Administration (see [Set up Comprise SmartPAY processing in Polaris Administration](#)). Similar processing is available for donations.

SMARTPAY INVOICE		
Annapolis Public Library 57 Main Avenue Ocean Grove, NJ 07770 TLF: 609-854-4812		
 The Easy, Convenient Way to Make Library Payments!		
Invoice #		7399
Track #		2254
Auth Code #		2333
Date		9/16/2023
Amount Paid		\$24.95
Item	Description	Amount
Charge	Replacement Cost-Buried in treasures - help for comprehensive acquiring, saving, and handling	\$16.95
Charge	Oversize Item-The problem of the early servant / a Charles Dodgson/Arthur Conan Doyle mystery	\$5.00
Charge	Processing Fee	\$3.00
		Card # XXXXX-1111
		Total Paid \$24.95
Time remaining 30 seconds <input type="button" value="Print"/> <input type="button" value="Finish"/>		
Cardholder acknowledges the amount set forth above and agrees to abide by the terms agreement with the Cardholder.		
T E R M S		
Copyright Comprise Technologies Inc. Please print and keep a copy for your records.		

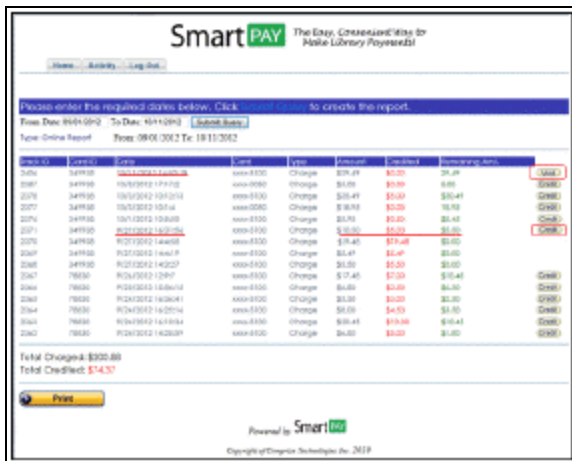
### SmartPAY Staff User Interface

SmartPAY also provides a SmartPAY API Staff User Interface at <https://dev.comprisetechologies.com/SMARTPAYAPI/WEBSMARTPAY.dll?Adminlogin>

You can use this interface to get a transaction report, and credit or void transactions.



Supply the username and password provided by SmartPAY, and log in. From the **Activity** tab, you can list all transactions made from SmartPAY terminals or online for the specified time period.



Credits can be made for any transactions that were made before today and have a remaining payment balance. Voids can be made for payment transactions that were made today. However, Credits and Voids made from the SmartPAY API Staff User Interface do not update the patron account in Polaris. The staff member must manually reconcile these transactions within Polaris.

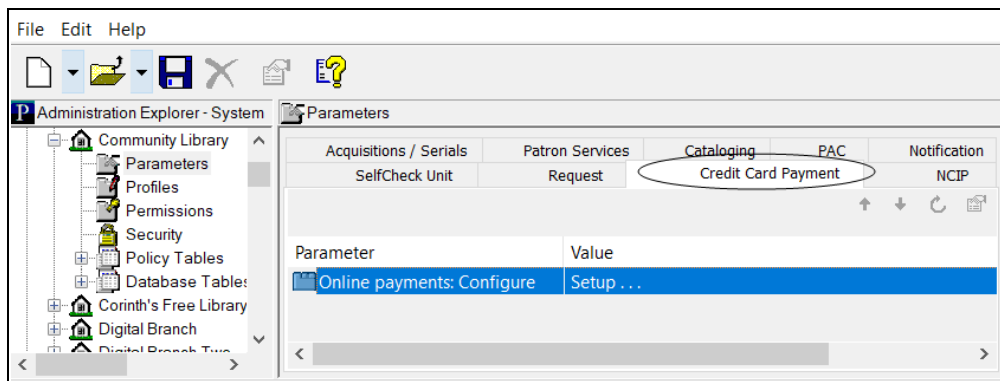
## Set Up Comprise SmartPAY Processing in Polaris Administration

Only one payment gateway can be selected for a branch or library organization. However, within a consortium that uses the Polaris turnkey ILS, branch and library organizations may implement different gateways; some may use Comprise SmartPAY, while others may choose other gateways.

If your library has multiple Comprise accounts, you can set the following fields at the Branch level: **Payment page/service URL**, **Customer Name**, and **Customer ID**.

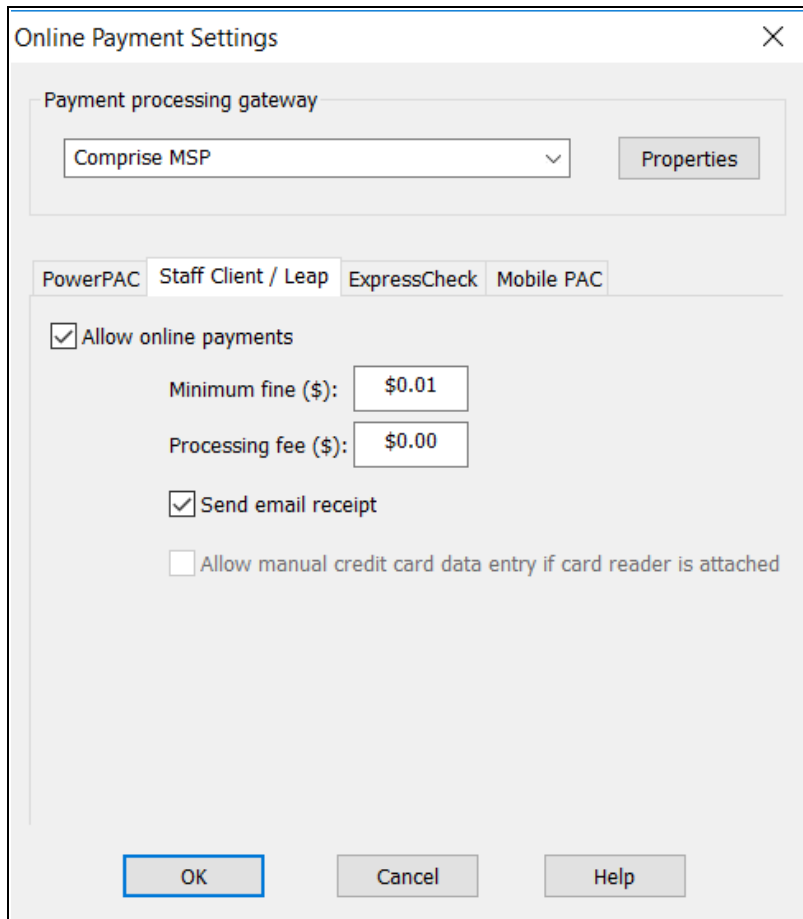
To set up Polaris for Comprise SmartPAY credit card processing in Polaris Administration for the appropriate organizations:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.
2. Double-click **Online Payments: Configure**.



The Online Payments Settings dialog box opens.

3. Select **Comprise MSP** in the **Payment processing gateway** list.



4. Click **Properties**. The Comprise MSP properties dialog box opens.

Comprise MSP

Connection

Payment page/service URL:

Customer Name:

Customer ID:

User Name:

Password:

Location ID:

PAC Return URL:

MPAC Return URL:

Donations PAC Return URL:

Donations MPAC Return URL:

Postback URL:

Inactivity timeout:  seconds

OK Cancel Help

5. Enter the following settings on the Connection tabbed page, then click **OK**:

- **Payment page/service URL (SmartPay API Address)** - Set at the System level for a single Comprise account or at the Branch level if you have multiple Comprise accounts. Provided by Comprise. This is the SmartPAY payment page.
- **Customer Name**- Set at the System level for a single Comprise account or at the Branch level if you have multiple Comprise accounts. Provided by Comprise, passed to SmartPay during the payment transaction.
- **Customer ID**- Set at the System level for a single Comprise account or at the Branch level if you have multiple Comprise accounts. Provided by Comprise, passed to SmartPay during the payment transaction.
- **User name** - Provided by Comprise. Each branch has its own user name.

- **Password** - Provided by Comprise. Each branch has its own password.
- **Location ID** - Provided by Comprise. Apply to PAC only. Pass to SmartPay WEB API. One per branch.
- **PAC Return URL** - PowerPAC page to which the user is returned after fines payment, typically the patron account page. Maximum 250 alphanumeric characters.
- **MPAC Return URL** - Mobile PAC page to which the user is returned after fines payment, typically the patron account page. Maximum 250 alphanumeric characters.

**Note:**

When a patron cancels a payment from PowerPAC or Mobile PAC, the appropriate Return URL page is displayed.

- **Donations PAC Return URL** - PowerPAC page to which the user is returned after a donation payment. Maximum 250 alphanumeric characters.
- **Donations MPAC Return URL** - Mobile PAC page to which the user is returned after a donation payment. Maximum 250 alphanumeric characters.
- **Postback URL** - The location on the library Web site used to update the Polaris database. This location applies to both PowerPAC and Mobile PAC, and is not branch-specific. Maximum 250 alphanumeric characters.  
Format:https://servername:port/payments/PostbackSmartpay.aspx  
For example:**https://mylibrary.com/polaris/payments/PostbackSmartpay.aspx**
- **Inactivity timeout** - Specifies how long Polaris waits for the credit transaction to be processed before canceling it. This setting applies to ExpressCheck and the staff client only (not to PowerPAC or Mobile PAC).

**Note:**

You can also set an **Inactivity timeout** value set for ExpressCheck transactions (SelfCheck Unit parameters, **Polaris ExpressCheck: Options**). The default value for both settings is 60 seconds. Polaris ExpressCheck times out after

the total of both settings to ensure that the ExpressCheck application never times out before the credit card transaction processing time.

6. To set up credit card payments from Polaris PowerPAC, be sure **Comprise MSP** is still selected in the Online Payments Settings dialog box, and follow these steps:
  - a. Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.
  - b. Select **Allow online payments**. The payment options become available.

**Note:**

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See the Public Access Administration PDF Guide, Enable patron account access - PowerPAC.

- c. Set the minimum fine amount you want to accept by credit card payment. The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.
- d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.

**Note:**

The e-mail receipt option is not applicable, because SmartPAY sends the receipt to the e-mail address the patron specifies on the SmartPAY payment page.

- e. To display a privacy policy link in Polaris PowerPAC, select **Display privacy policy**. See [Privacy and Refund Policy Display Options](#).
- f. To display a refund policy link in Polaris PowerPAC, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).
- g. To accept credit card payments for donations, select **Allow donations**.



- h. To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
  - i. To allow donors to direct a donation toward a title purchase in a specific subject area, select **Allow patron to designate title purchase**. This option places an appropriate control on the donations page, where the donor can specify a title purchase.
7. To set up credit card payments from Mobile PAC, follow these steps:
- a. Click the **Mobile PAC** tab on the Online Payments Settings dialog box.
  - b. Select **Allow online payments**. The payment options become available.
  - c. Set the minimum fine amount you want to accept by credit card payment. The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in Mobile PAC.
  - d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.

**Note:**

The e-mail receipt option is not applicable, because SmartPAY sends the receipt to the e-mail address the patron specifies on the SmartPAY payment page.

- e. To display a privacy policy link in Mobile PAC, select **Display privacy policy**. See [Privacy and Refund Policy Display Options](#).
  - f. To display a refund policy link in Mobile PAC, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).
  - g. To accept credit card payments for donations, select **Allow donations**.
  - h. To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
  - i. To allow donors to direct a donation toward a title purchase in a specific subject area, select **Allow patron to designate title purchase**. This option places an appropriate control on the donations page, where the donor can specify a title purchase.
8. To set up credit card payments from the staff client, follow these steps:

**Note:**

To accept credit card payments, the staff client workstation must be equipped with a Comprise SmartTerminal credit card reader, and you must specify the SmartTerminal ID for each workstation. See step 11.

- a. Click the **Staff Client** tab on the Online Payments Settings dialog box.
- b. Select **Allow online payments**. The payment options become available.
- c. Set the minimum fine amount you want to accept by credit card payment.
- d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e. To provide an automatic e-mail payment receipt to patrons, select **Send email receipt**. The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The staff member cannot specify an e-mail address during the payment process.

**Note:**

The manual data entry option is not applicable. Staff client workstations must use the Comprise SmartTerminal to swipe the patron's credit card.

9. To set up credit card payments from Polaris ExpressCheck, follow these steps:

**Note:**

To accept credit card payments, the Polaris ExpressCheck workstation must be equipped with a Comprise SmartTerminal credit card reader, and you must specify the SmartTerminal ID for each workstation. See step 11.

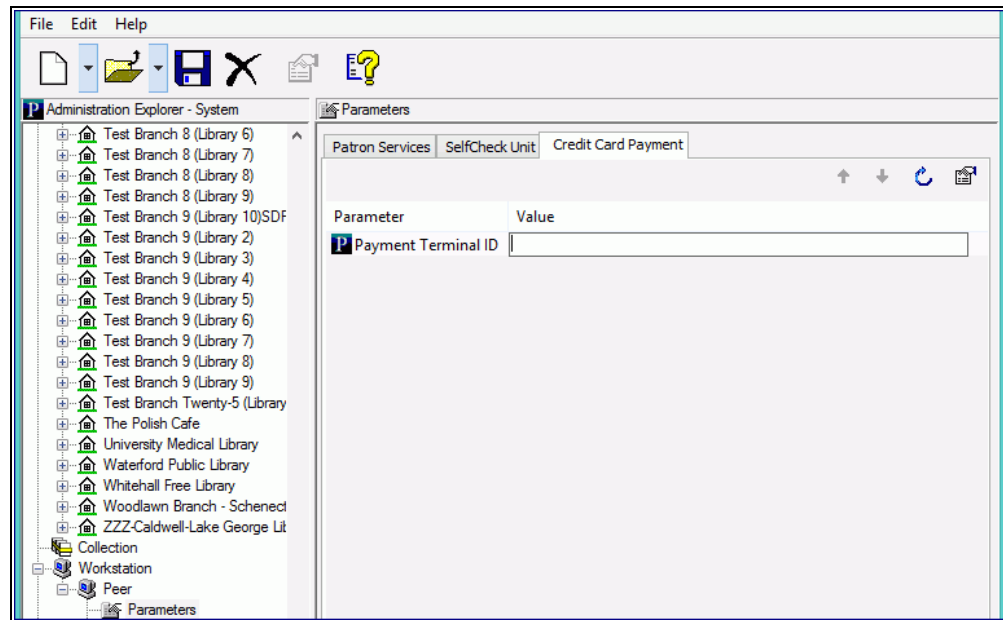
- a. Click the **ExpressCheck** tab on the Online Payments Settings dialog box.
- b. Select **Allow online payments**. The payment options become available.
- c. Set the minimum fine amount you want to accept by credit card payment.


- d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
  - e. To provide an automatic e-mail payment receipt to patrons, select **Send email receipt**. The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The patron cannot specify an e-mail address during the payment process.
  - f. To display a privacy policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select **Display privacy policy**. See [Privacy and Refund Policy Display Options](#).
  - g. To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).
  - h. Click **OK** to save your settings.
10. **For each staff client and ExpressCheck workstation with a SmartTerminal**, specify the payment terminal ID by following these steps:

**Note:**

Comprise supplies the terminal ID values for your workstations.

- a. From the workstation listed in Administration Explorer or the workstation workform, select **Parameters > Credit Card Payment**.



- b. Double-click **Payment Terminal ID** and enter the workstation SmartTerminal ID.
- c. Select **File > Save**, or click .

---

## E-Commerce with PayPal Payflow Link

Polaris supports PayPal's Payflow Link payment gateway for credit card payments from Polaris PowerPAC and Mobile PAC. The Payflow Link gateway is a "redirect and postback" method of providing credit card payments from Polaris PAC applications. An advantage of this method is that much of the responsibility of PCI compliance falls to the gateway, which handles authorization requirements, rather than the library. No credit card information is stored in the Polaris database when payment is made through the Payflow Link hosted payments site. For more information about the Payflow Link gateway, see

[https://merchant.paypal.com/cgi-bin/marketingweb?cmd=\\_render-content&content\\_ID=merchant/payment\\_gateway](https://merchant.paypal.com/cgi-bin/marketingweb?cmd=_render-content&content_ID=merchant/payment_gateway)

**Important:**

PayPal supports TLS 1.0. If Payflow link is attempting to post back to the Polaris PAC site, it will fail if the server has been configured to allow TLS 1.1 and TLS 1.2 connections (TLS 1.0 has been disabled)

The logged-on PAC user selects the charges to pay and clicks **Pay Fines Now**. When the user clicks **Pay Fines Now**, the Payflow Link checkout page opens. After the credit card payment transaction has been set up and finalized, the user clicks a link to return to the Fines & Fees page in the Polaris patron account. Payflow Link sends an e-mail receipt for the payment to the user's e-mail address specified on the Hosted Checkout page. Similar processing is available for donations.

The Polaris e-commerce licenses for Polaris PowerPAC and Mobile PAC (if your system includes Mobile PAC) are required to use this feature. For fine payments, both the PAC connection branch and the patron's registered branch must support credit card processing. The patron's registered branch settings determine the specific credit card processor and parameters. For donations, the selected recipient branch's settings determine the specific credit card processor and parameters.

Payments from the staff client or from Polaris ExpressCheck are not supported.

**Note:**

When the payment processing gateway for the staff client log-in branch is

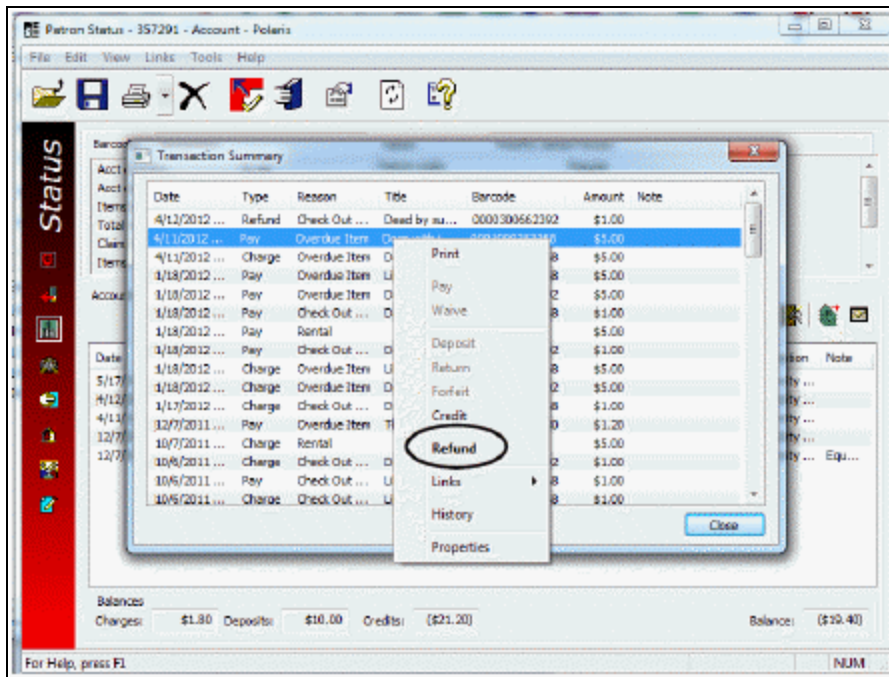
Payflow Link, the Credit Card Payments Manager is not available from the **Utilities** menu. At branches where the Credit Card Payments Manager is accessible, store orders and store transactions do not appear for Payflow Link transactions.

See also:

- [Refunds](#)
- [Payflow Link Reports](#)
- [Set up the PayPal Payflow Link gateway account](#)
- [Set up Payflow Link processing in Polaris Administration](#)

## Refunds

With the Payflow Link hosted gateway solution, refund transactions are not integrated in Polaris. Credit card refunds must be handled separately, both through Payflow Link and manually from the Polaris patron account in the Polaris staff client. For example, if a replacement charge has been paid via credit card, the refund must be issued manually from the Polaris patron account transaction summary and then again from Payflow Link. Work with Payflow Link to establish the appropriate staff accounts for handling refunds, then establish the refunds workflow with your staff. Do not allow staff to issue refunds to credit card payments from the Polaris patron account as cash or credit; instead, they must select **Refund**.

**Note:**

If a patron successfully pays by credit card using the Payflow Link web page and the transaction is voided because Polaris was unable to update the database, then no record of a payment is made in Polaris and the patron's credit card payment will be voided by Payflow Link. If a staff member attempts to manually void a transaction using the PayPal manager, the void transaction is not reflected in Polaris.

Polaris also supports integrated credit card processing, such as PayPal's Payflow Pro (see [E-Commerce with PayPal® Payflow Pro®](#)), which does offer credit card refunds from within Polaris. In systems where some sites use an integrated solution and others use a gateway solution such as Payflow Link, refunds can only be made in these circumstances:

- The staff client log-on branch supports integrated payments and the **Online Payments: Configure** option in Polaris Administration (Credit Card parameters) is set to allow payments from the staff client for the integrated solution.
- The original payment was made using the integrated solution and the **Online Payments: Configure** option is set to allow payments from the staff client for the integrated solution.

Otherwise, when an attempt is made to refund a credit card payment in Polaris, a message displays indicating that no refund transaction can be created. The credit card is not refunded and the patron account is left as is. This situation might occur if a consortium has implemented both integrated and hosted credit card payment solutions, or a library or consortium has changed from one solution to another and the refund is attempted after the change.

### Lost Item Recovery

If a lost-and-paid item is recovered at check-in and the payment was made via credit card, and the library has set the lost-and-paid item recovery options to automatically credit the patron’s account, a “dummy” refund is created instead of a credit. The refund will appear as a refund in the Polaris patron account and a refund transaction created. This transaction is available for reporting in the Refunds to Credit Card Payments report. You can use the report to cross-check transactions logged in Payflow Link. (Note that the refund must also be made from Payflow Link.)

Instead of automatically crediting the patron’s account, you may want to set the lost-and-paid item recovery options to **Leave as is**. With this setting, the payments remain in the Polaris patron account and the refund or credit can be done from Payflow Link. Or your library may choose to disable all automatic recovery actions, requiring staff to create manual refunds when a lost-and-paid item is recovered. For more information about setting lost item recovery options, see [Setting Lost Item Recovery Defaults](#).

### Payflow Link Reports

Payflow Link offers transaction reports; for example:

- **Transaction Summary Report**

The screenshot shows a web-based report titled "Transaction Summary Report". At the top, there are filters for Login Name (PayPal/Polaris/PayFlow), Date (Wed May 02, 2012 to Wed May 02, 2012), Time Zone (U.S. Pacific), Settlement Status (All Transactions), and Transaction Mode (Test). Below the filters, there is a "Download" button set to "1. ASCII Text" and a "Go" button. A pagination indicator shows "1-2 of 2 First | Prev | Next | Last". The main data is presented in a table with the following columns: TRANSACTION TYPE, PROCESSOR, COUNT, RESULT CODE, CARD TYPE, CURRENCY, MINIMUM AMOUNT, MAXIMUM AMOUNT, AVERAGE AMOUNT, and TOTAL AMOUNT. The table contains two rows: one for "Sale" with 4 transactions, result code 0, Visa card type, USD currency, a minimum of 8.00, a maximum of 15.00, an average of 11.50, and a total of 46.00; and one for "Void" with 2 transactions, result code 0, Visa card type, USD currency, a minimum of 8.00, a maximum of 15.00, an average of 11.50, and a total of 22.00. At the bottom, there is another "Download" button set to "1. ASCII Text" and a "Go" button, along with the same pagination indicator.

TRANSACTION TYPE	PROCESSOR	COUNT	RESULT CODE	CARD TYPE	CURRENCY	MINIMUM AMOUNT	MAXIMUM AMOUNT	AVERAGE AMOUNT	TOTAL AMOUNT
Sale	FDMS Nashville	4	0	Visa	USD	8.00	15.00	11.50	46.00
Void	FDMS Nashville	2	0	Visa	USD	8.00	15.00	11.50	22.00



- Daily Activity Transaction Report - The transaction IDs match those stored in the ILSStoreTransactions.OrgID Polaris database table. Comment1 is the payment reason and transacting organization; Comment2 is the Polaris store order ID and the patron barcode, if any.

**Daily Activity Transaction Report**

Login Name	Report Type	Date	Time Zone	Transaction Mode
PayPalPolarisQA	Full Details	Thu Jun 14, 2012	U.S. Pacific	Test

Download: 1 ASCII Text  1-3 of 3 First | Prev | Next | Last

TRANSACTION ID	TRANSACTION TIME	TRANSACTION TYPE	CARD TYPE	ACCOUNT NUMBER	EXPIRATION DATE	CURRENCY	AMOUNT	RESULT	RESPONSE MESSAGE	COMMENT1	COMMENT2
<a href="#">V24A2NBB101A</a>	Jun 14, 2012 6:04:51 AM	Sale	Visa	1111	06/15	USD	2.05	0	Approved	Fine-Schenectady County Public Library - Central	702-offline102010
<a href="#">V25A2NBB6A23</a>	Jun 14, 2012 6:13:13 AM	Sale	Visa	1111	06/15	USD	10.50	0	Approved	Danston-Schenectady County Public Library - Central	704-
<a href="#">V34A2NBB166E</a>	Jun 14, 2012 6:08:01 AM	Sale	Visa	1111	06/15	USD	25.50	0	Approved	Danston-Schenectady County Public Library - Central	703-

Download: 1 ASCII Text  1-3 of 3 First | Prev | Next | Last

### Set up the PayPal Payflow Link gateway account

Your library can establish a merchant account with Payflow Link directly. To set up the account:

1. Sign up for your Payflow Link gateway account.
2. Log on to PayPal Manager.
3. Go to **Service Settings** and select **Setup**.

- Under **Choose your settings**, set Transaction Process Mode to **Live** when you are ready to go live with credit card payments. (For set-up purposes, set this option to **Test**.)

**Note:**  
Settings under **Display options on payment page** are optional.

- Under **PayPal Express Checkout**, set **Enable PayPal Express Checkout** to **Yes**.

- Under **Billing Information**, specify the required and editable fields for the billing information the user must supply.
- Under **Payment Confirmation**, **Show confirmation page**, select **On a PayPal hosted page**.

8. Enter text for your return URL. This text labels the link that returns the patron to the Polaris PowerPAC patron account Fines & Fees page, or the equivalent page in Mobile PAC if a mobile device is detected.
9. In the **Enter Return URL** box, type the URL for the interim page that redirects the user to Polaris PowerPAC or Mobile PAC, if a mobile device is detected:  
**https://www.mylibrary.org/polaris/payments/payflowlinkreturn.aspx**, where **www.mylibrary.org/polaris** is your PAC web site.
10. Set **Return URL Method** to **Link**.

11. Under **Silent Post for Data Transfer**, set **Use Silent Post** to **Yes**.
12. In the **Enter Silent Post URL** field, enter the post-back URL for your site:  
**https://www.mylibrary.org/polaris/Payments/PostbackPayflowLink.aspx**, where **www.mylibrary.org/polaris** is your PAC web site.
13. Select **Void transaction when my server fails to receive data sent by the silent post**.

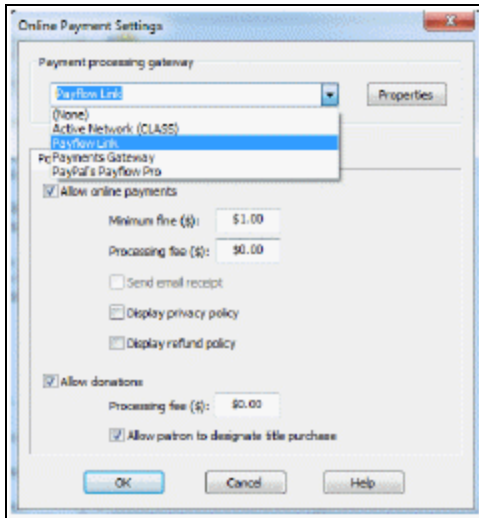
14. Under **Email Confirmation**, set **Do you want us to confirm payment by email** to **Yes**.

15. Under **Configure Security Options**, set **Enable Secure Token** to **Yes**.

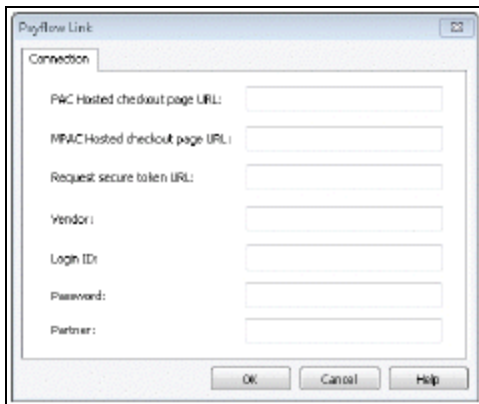
### Set up Payflow Link processing in Polaris Administration

To set up Polaris for Payflow Link credit card processing in Polaris Administration:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.
2. Double-click **Online Payments: Configure**. The Online Payments Settings dialog box opens.
3. Select **Payflow Link** in the **Payment processing gateway** list.



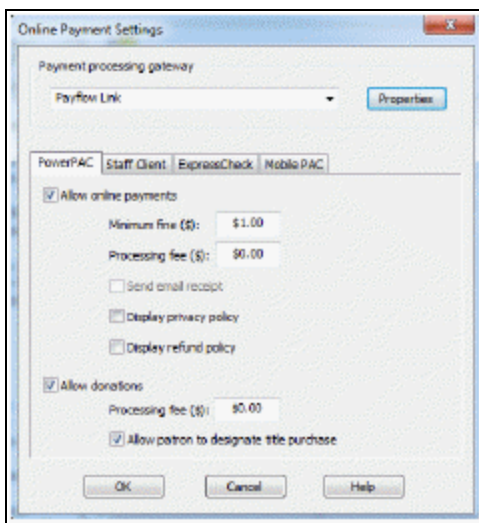
4. Click **Properties**. The Payflow Link Properties dialog box opens.



5. Enter the following settings on the Connection tabbed page, then click **OK**:

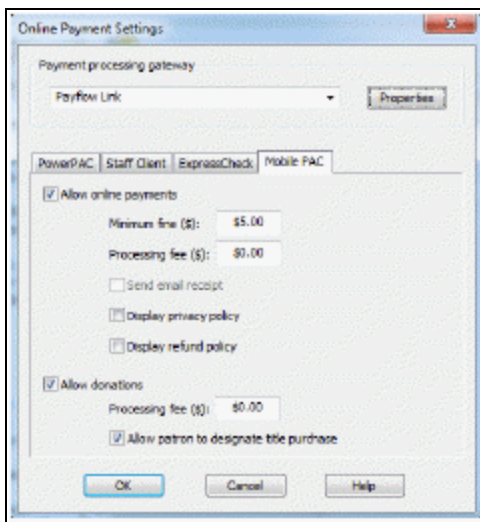
- PAC Hosted checkout page URL - From PowerPAC, the redirect page link to the Payflow Link hosted checkout page (maximum 250 characters, alphanumeric). Obtain this setting from Payflow Link. Example: **https://payflowlink.paypal.com**
- MPAC Hosted checkout page URL - From Mobile PAC, the redirect page link to the Payflow Link hosted checkout page (maximum 250 characters, alphanumeric). Obtain this setting from Payflow Link.
- Request secure token URL - The PayFlow API URL: **https://payflowpro.paypal.com** for live operation, or **https://pilot-payflowpro.paypal.com** for test.
- Vendor - Optional. Your library's main account name. Obtain this setting from Payflow Link.

- Login ID - Your Payflow Link login ID.
  - Password - Your Payflow Link password.
  - Partner - Typically **PayPal**. However, if you set up an account through a partner such as bank, type the partner's code. Obtain this setting from your partner; for example, **WFB** for Wells Fargo bank.
6. To set up credit card payments from Polaris PowerPAC, be sure **PayFlow Link** is still selected in the Online Payments Settings dialog box, and follow these steps:
- a. Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.



- b. Select **Allow online payments**. The payment options become available.
- c. Set the minimum fine amount you want to accept by credit card payment. The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.
- d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e. To display a privacy policy link in Polaris PowerPAC, select **Display privacy policy**. See: [Privacy and Refund Policy Display Options](#).
- f. To display a refund policy link in Polaris PowerPAC, select **Display refund policy**. See: [Privacy and Refund Policy Display Options](#).
- g. To accept credit card payments for donations, select **Allow donations**.

- h. To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
  - i. To allow donors to direct a donation toward a title purchase in a specific subject area, select **Allow patron to designate title purchase**. This option places an appropriate control on the donations page, where the donor can specify a title purchase.
7. To set up credit card payments from Mobile PAC, follow these steps:
- a. Click the **Mobile PAC** tab on the Online Payments Settings dialog box.



- b. Select **Allow online payments**. The payment options become available.
- c. Set the minimum fine amount you want to accept by credit card payment. The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in Mobile PAC.
- d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e. To display a privacy policy link in Mobile PAC, select **Display privacy policy**. See [Privacy and Refund Policy Display Options](#).
- f. To display a refund policy link in Mobile PAC, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).
- g. To accept credit card payments for donations, select **Allow donations**.
- h. To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
- i. To allow donors to direct a donation toward a title purchase in a specific subject area, select **Allow patron to designate title purchase**. This option places an

appropriate control on the donations page, where the donor can specify a title purchase.

8. Click **OK** to save your settings.



---

## E-Commerce with JetPay

Polaris supports the use of JetPay for accepting credit card payments from Polaris PowerPAC. JetPay is a hosted method of accepting credit card payments from PowerPAC. You can enable the use of JetPay at the system, library, or branch level.

When you use JetPay for payments, JetPay handles much of the responsibility of Payment Card Industry Data Security Standard (PCI DSS) compliance for your library. No credit card information is stored in the Polaris database when a payment is made via JetPay.

**Note:**

The use of JetPay for payments from the staff client, Polaris ExpressCheck, or Mobile PAC is not supported.

To enable JetPay e-commerce, you must:

1. [Set up a JetPay account.](#)
2. [Set up JetPay processing in the Administration Explorer.](#)

For additional information about handling refund transactions when using JetPay for credit card payments, search Polaris help for "Handling Refunds When Using JetPay."

## **Set Up a JetPay Account**

To enable the use of JetPay for accepting credit card payments from Polaris PowerPAC, [contact JetPay](#) to establish an account for your library.

When establishing your library's JetPay account, make a note of the following two pieces of information:

- Client key
- Web key

You will need this information to [set up JetPay processing in the Administration Explorer](#).

## Set Up JetPay Processing in the Administration Explorer

**Note:**

To complete this workflow, your library must have already established a JetPay account. For more information, see [Set Up a JetPay Account](#).

To configure Polaris to use JetPay for processing credit card payments from PowerPAC:

1. In the Administration Explorer tree view, navigate to the organization for which you want to enable JetPay processing, and click **Parameters > Credit Card Payment**.
2. Double-click **Online Payments: Configure**.

The Online Payments Settings dialog box opens.

Online Payment Settings

Payment processing gateway

JetPay

Properties

PowerPAC Staff Client / Leap ExpressCheck Mobile PAC

Allow online payments

Minimum fine (\$): \$1.00

Processing fee (\$): \$0.00

Send email receipt

Display privacy policy

Display refund policy

Allow donations

Processing fee (\$): \$0.00

Allow patron to designate title purchase

OK Cancel Help

3. In the **Payment processing gateway** list, select **JetPay**.
4. Click **Properties**.

The JetPay dialog box appears.

The screenshot shows a dialog box titled "JetPay" with a close button (X) in the top right corner. The dialog has a "Connection" tab. Inside the tab, there are several text input fields and a checkbox:

- Transaction URL: [Empty text box]
- Payment page URL: [Empty text box]
- Transaction fee URL: [Empty text box]
- Client key: [Empty text box]
- Web key: [Empty text box]
- Post-back URL: [Empty text box]
- PAC return URL: [Empty text box]
- Donations PAC return URL: [Empty text box]
- Library absorbs fees:

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

5. Enter the following connection information:
  - a. Transaction URL - Enter the following URL:  
https://magic.collectorsolutions.com/magic-api/api/transaction/redirect
  - b. Payment page URL - Enter the following URL:  
https://magic.collectorsolutions.com/magic-ui/PaymentRedirect
  - c. Transaction fee URL - Enter the following URL:  
https://magic.collectorsolutions.com/magic-api/api/fee
  - d. Client key - Enter the client key provided when your library [set up a JetPay account](#).
  - e. Web key - Enter the web key provided when your library [set up a JetPay account](#).
  - f. Post-back URL - Enter the post-back URL for your site, using the format below:

<https://<www.mylibrary.org/polaris>/payments/PostbackJetPay.aspx>

**Note:**

Replace <www.mylibrary.org/polaris> with your Polaris PowerPAC URL.

This field accepts a maximum of 250 alphanumeric characters.

- g. PAC return URL - Enter the URL that will be displayed when the user clicks the return link on the JetPay final payment transaction page. To use your library's PowerPAC patron account Fine & Fees page, use the format below:

<https://<www.mylibrary.org>/polaris/patronaccount/finesfees.aspx>

**Note:**

Replace <www.mylibrary.org/polaris> with your Polaris PowerPAC URL.

This field accepts a maximum of 250 alphanumeric characters.

- h. Donations PAC return URL - If you plan to accept donations, enter the URL of the Polaris PowerPAC page that will be displayed when the user clicks the return link on the JetPay final payment transaction page. This field is required. If you do not plan to accept donations, simply enter your PAC Return URL. This field accepts a maximum of 250 alphanumeric characters.
  - i. Library absorbs fees - Select this checkbox if you want the library to absorb the JetPay credit card processing fee. This checkbox is a shadow setting of how your account is set up in JetPay to display warnings and fees to the patron and it must match the corresponding setting in JetPay. If this checkbox is not selected, the processing fee is billed to the patron.
  - j. Click **OK**.
6. Configure the following settings on the **PowerPAC** tab of the Online Payments Settings dialog box:
- a. Allow online payments - Select this checkbox to enable the use of JetPay for credit card payment processing.

**Note:**

In PowerPAC, patrons pay fines on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation:**

**Fines & fees** is set to **Yes** for the organization to allow patrons to access this page. For more information, see the Public Access Administration PDF Guide, Enable patron account access - PowerPAC.

- b. Minimum fine - Enter the minimum fine amount that will be accepted via credit card payment. The default value for this setting is \$1.00.

**Note:**

If the amount a patron owes is less than the **Minimum fine** value, the **Pay fines** link does not appear in the patron's account in Polaris PowerPAC.

- c. Processing fee - This is controlled completely by JetPay and should be set up there. To charge a processing fee for fine payments, enter an amount in the **Processing fee** box. The maximum value for this setting is \$20.00. The default value is \$0.00.
  - d. Display privacy policy - To display a privacy policy link in Polaris PowerPAC, select **Display privacy policy**. For more information, see [Privacy and Refund Policy Display Options](#).
  - e. Display refund policy - To display a refund policy link in Polaris PowerPAC, select **Display refund policy**. For more information, see [Privacy and Refund Policy Display Options](#).
  - f. Allow donations - Select this checkbox to enable the use of credit card payments for donations.
  - g. Processing fee - This is controlled completely by JetPay and should be set up there. To charge a processing fee for donations, enter an amount in the **Processing fee** box for donation payments. The maximum value is \$20.00. The default value is \$0.00.
  - h. Allow patron to designate title purchase - Select this checkbox to allow the donor to direct a donation toward a title purchase in a specific subject area. When this option is selected, the donations page includes a field where the donor can specify a title purchase.
7. Click **OK** to save your settings.

---

## E-Commerce with Payments Gateway Secure Web Pay

Polaris supports Payments Gateway Secure Web Pay (SWP) for credit card payments from Polaris PowerPAC and Mobile PAC. Payments Gateway SWP is a hosted “redirect and postback” method of providing credit card payments from Polaris PAC applications. An advantage of this method is that much of the responsibility of PCI compliance falls to Payments Gateway, which handles authorization requirements, rather than the library. No credit card information is stored in the Polaris database when payment is made through the Payments Gateway hosted payments site. For more information about Payments Gateway, see:

**<http://www.paymentsgateway.com/home.aspx>**

Payments from the staff client or from Polaris ExpressCheck are not supported.

**Note:**

When the payment processing gateway for the staff client log-in branch is Payments Gateway, the Credit Card Payments Manager is not available from the **Utilities** menu. At branches where the Credit Card Payments Manager is accessible, store orders and store transactions do not appear for Payments Gateway transactions.

See also:

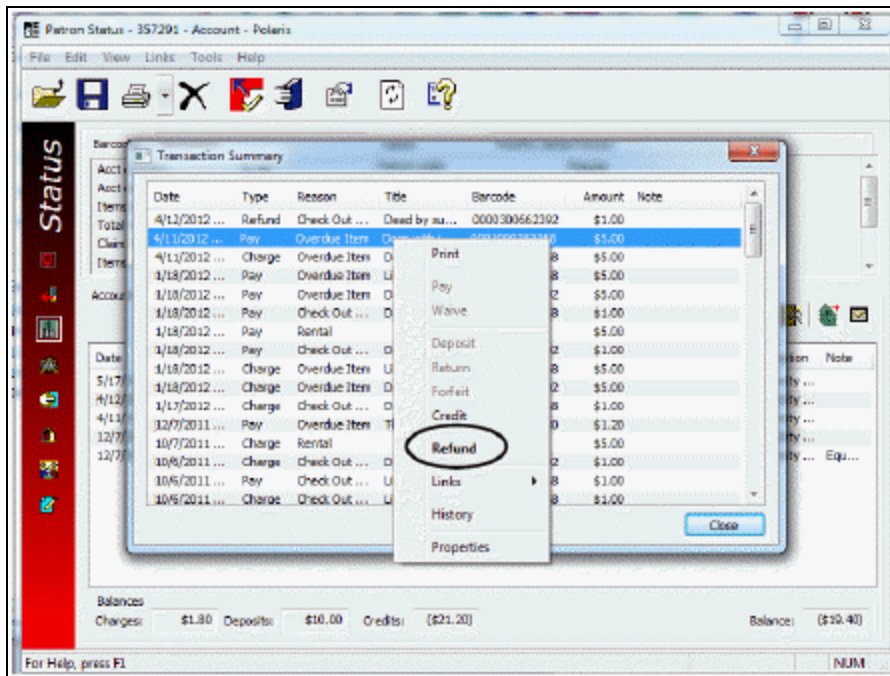
- [Refunds](#)
- [Payments Gateway Reports](#)
- [Set up the Payments Gateway SWP account](#)
- [Set up Payments Gateway processing in Polaris Administration](#)

### Refunds

With the Payments Gateway hosted solution, refund and void transactions are not integrated in Polaris. Credit card refunds must be handled separately, both through Payment Gateway’s Virtual Terminal management interface and manually from the Polaris patron account in the Polaris staff client. For example, if a replacement charge has been paid via credit card, the refund must be issued manually from the Polaris



patron account transaction summary and then again from the Virtual Terminal. Work with Payments Gateway to establish the appropriate staff accounts for handling refunds, then establish the refunds workflow with your staff. Do not allow staff to issue refunds to credit card payments from the Polaris patron account as cash or credit; instead, they must select **Refund**.

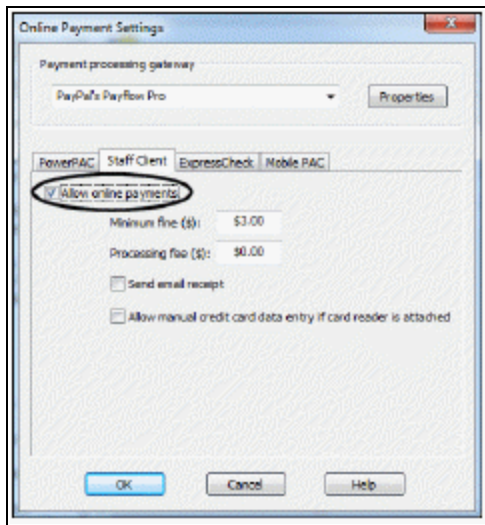


**Note:**

Voided payments, as when the connection fails, are not recognized in Polaris, and the voided transaction will appear in Polaris as a completed transaction.

Polaris also supports integrated credit card processing, such as PayPal's Payflow Pro (see [E-Commerce with PayPal® Payflow Pro®](#)), which does offer credit card refunds from within Polaris. In systems where some sites use an integrated solution and others use a gateway solution such as Payments Gateway, refunds can only be made in these circumstances:

- The staff client log-on branch supports integrated payments and the **Online Payments: Configure** option in Polaris Administration (Credit Card parameters) is set to allow payments from the staff client for the integrated solution.



- The original payment was made using the integrated solution and the **Online Payments: Configure** option is set to allow payments from the staff client for the integrated solution.

Otherwise, when an attempt is made to refund a credit card payment in Polaris, a message displays indicating that no refund transaction can be created. The credit card is not refunded and the patron account is left as is. This situation might occur if a consortium has implemented both integrated and hosted credit card payment solutions, or a library or consortium has changed from one solution to another and the refund is attempted after the change.

### ***Lost Item Recovery***

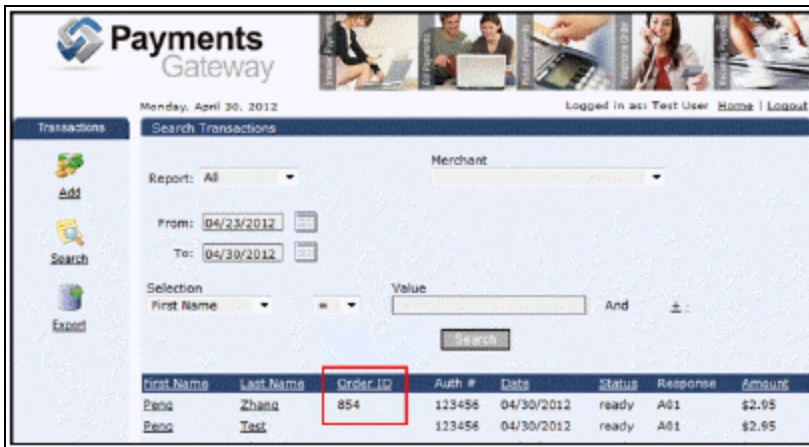
If a lost-and-paid item is recovered at check-in and the payment was made via credit card, and the library has set the lost-and-paid item recovery options to automatically credit the patron's account, a "dummy" refund is created instead of a credit. The refund will appear as a refund in the Polaris patron account and a refund transaction created. This transaction is available for reporting in the Refunds to Credit Card Payments report. You can use the report to cross-check transactions logged in the Virtual Terminal. (Note that the refund must also be made from the Virtual Terminal.)

Instead of automatically crediting the patron's account, you may want to set the lost-and-paid item recovery options to **Leave as is**. With this setting, the payments remain in the Polaris patron account and the refund or credit can be done from Payments Gateway. Or your library may choose to disable all automatic recovery actions, requiring staff to create manual refunds when a lost-and-paid item is recovered. For more

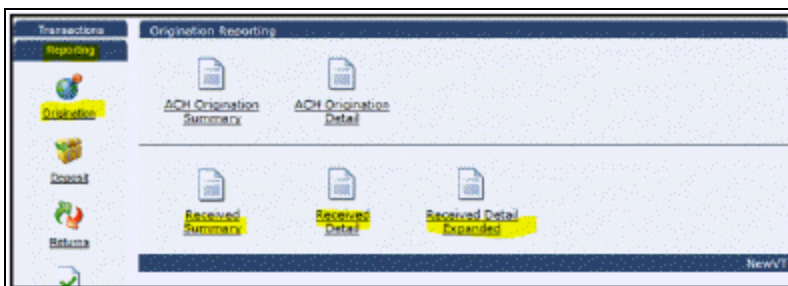
information about setting lost item recovery options, see [Setting Lost Item Recovery Defaults](#).

### Payments Gateway Reports

Payments Gateway offers extensive reporting capabilities. After your account is established (see [Set up the Payments Gateway SWP account](#)), you can log in and select **Transactions** to search for specific transactions.



Select **Reporting, Origination** to see detailed organization-level reports.

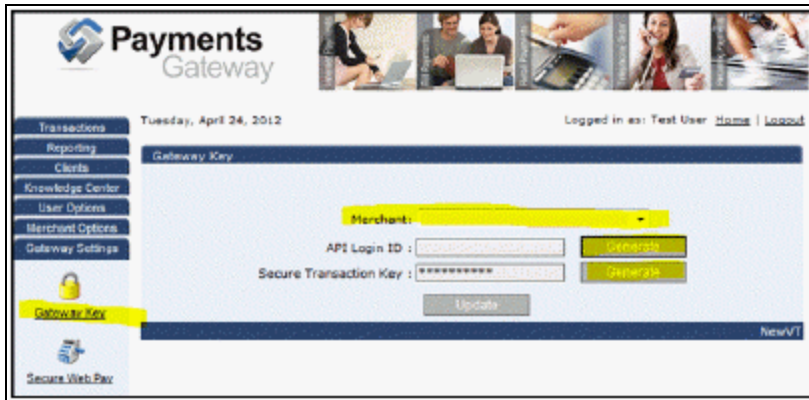


### Set up the Payments Gateway SWP account

Your library establishes a merchant account with Payments Gateway directly. You can set up one Payments Gateway SWP account for each branch that will offer credit card processing, or set up one account for your entire system, associated with a specific library administrator. To set up a Payments Gateway SWP account.

1. Go to <http://www.paymentsgateway.com/home.aspx> and follow the instructions to set up a SWP merchant account.

2. Log in to Payments Gateway Virtual Terminal (VT) with your SWP Merchant ID, username, and password at  
**<https://www.paymentsgateway.net/vt3/login.aspx>**
3. On the Payments Gateway VT page, select **Gateway Settings, Gateway Key**.
4. Generate the **API Login ID** and the **Secure Transaction Key**.



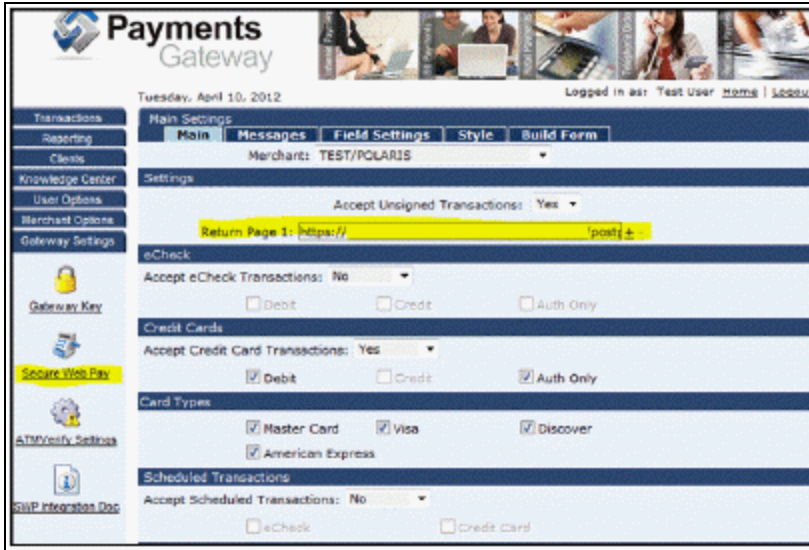
Record these values for use in Polaris Administration. See [Set up Payments Gateway processing in Polaris Administration](#).

5. Click **Update**.
6. Select **Gateway Settings, Secure Web Pay**.
7. Click the **Main** tab if it is not already selected.
8. In the **Return Page 1** field, enter the post-back URL for your site:  
**<https://www.mylibrary.org/polaris/Payments/PostbackPaymentsGateway.aspx>**,  
where  
**[www.mylibrary.org/polaris](https://www.mylibrary.org/polaris)** is your PAC web site. (Both PowerPAC and Mobile PAC use the same post-back URL.)

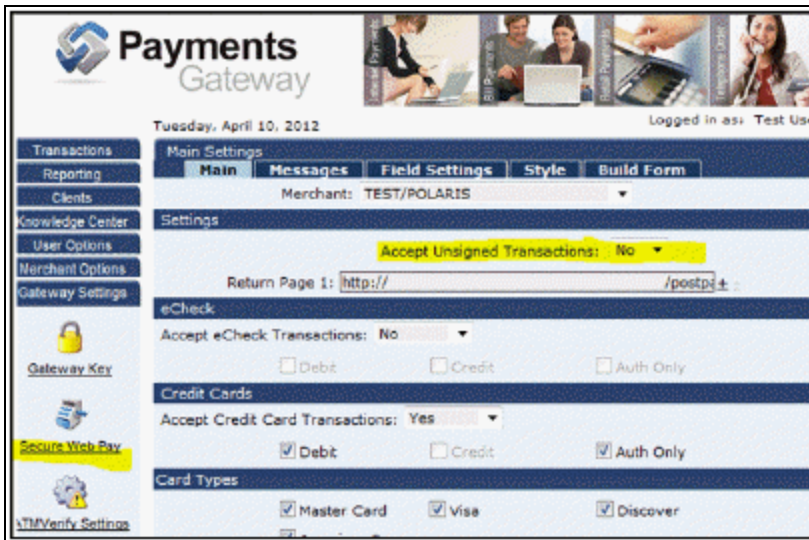
**Important:**

Payments Gateway does not accept hyphens in the post-back URL (Return Page 1).

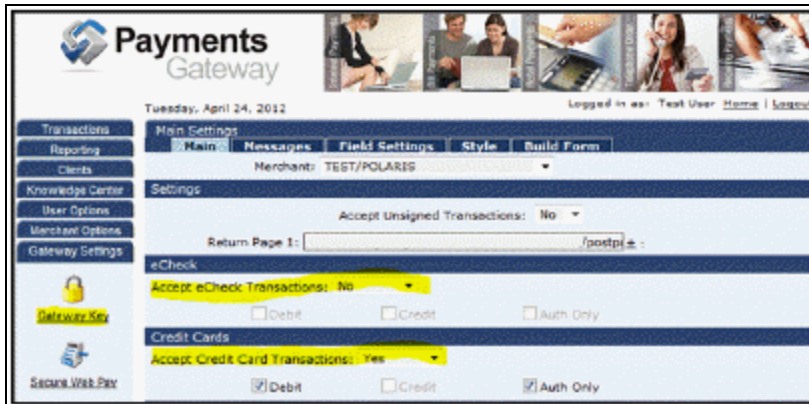
You will enter the same URL in Polaris Administration. See [Set up Payments Gateway processing in Polaris Administration](#).



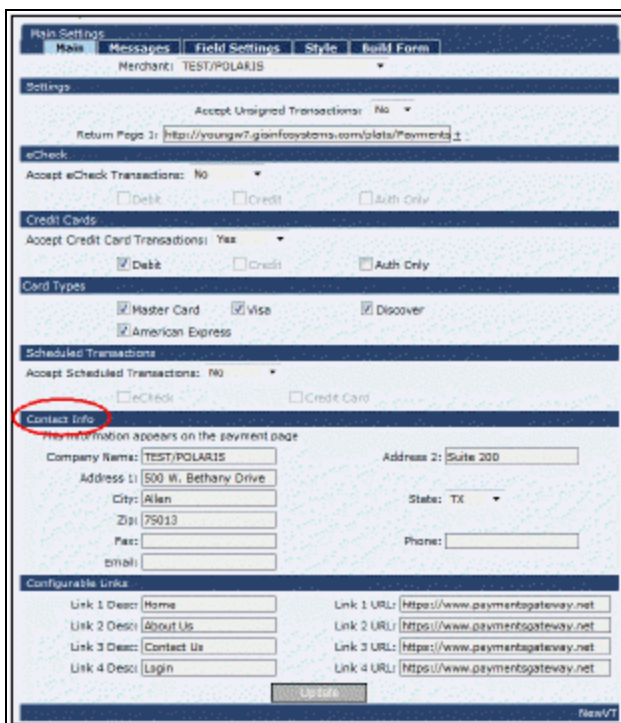
9. Set **Accept Unsigned Transactions** to **No**.



10. Set **Accept eCheck** to **No**, and set **Accept Credit Card Transactions** to **Yes**.



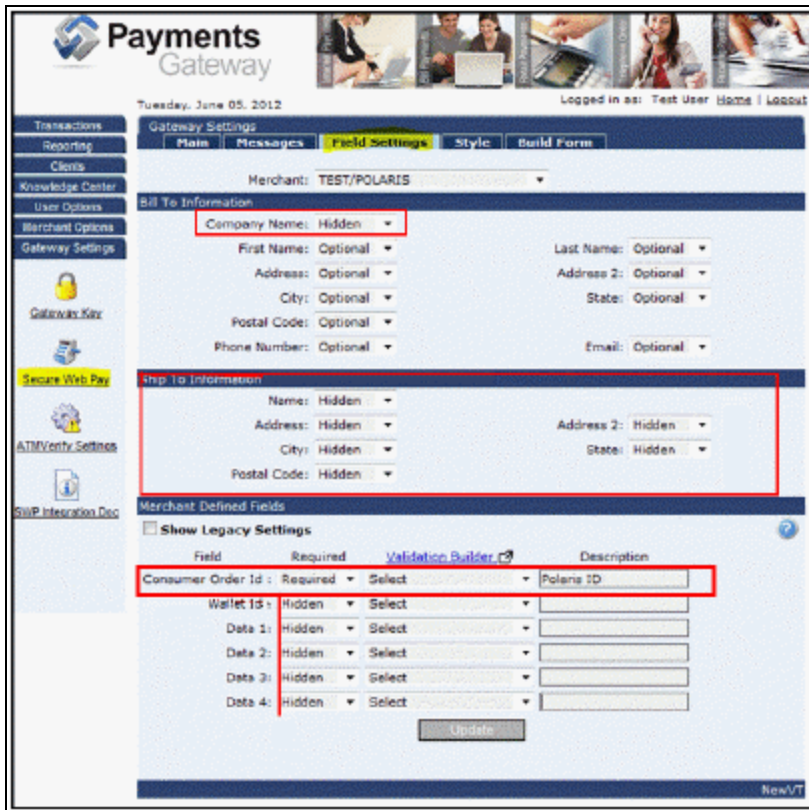
- In the Contact Info section, supply the information that should appear on the Hosted Checkout page.



- Click **Update**.
- Click the **Field Settings** tab and make the following settings:
  - Bill To Information** settings are recommended.
  - Ship To Information** - We recommend that you set these fields to **Hidden**.
  - Merchant Defined Fields - Consumer order ID** - Displays the order ID on Payments Gateway reports, necessary for identifying transactions (set to **Required**). When



this option is set to required, the order ID is also displayed on the Hosted Checkout page. You can type a description that will make sense to the patron; for example, **Polaris Payment ID**. Set the other Merchant Defined Fields to **Hidden**.

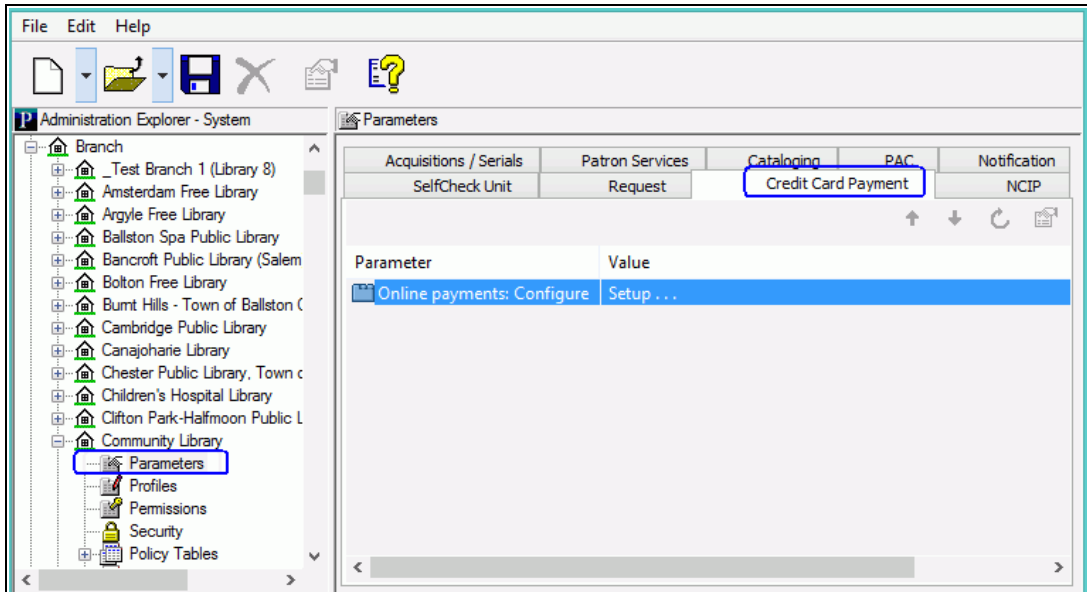


14. Click **Update**.

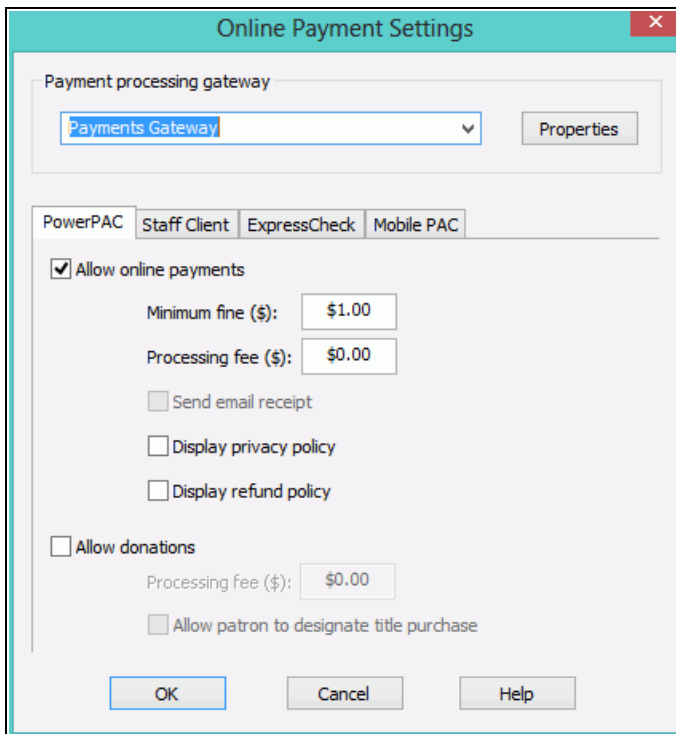
### Set up Payments Gateway processing in Polaris Administration

To set up Polaris for Payments Gateway SWP credit card processing in Polaris Administration:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.

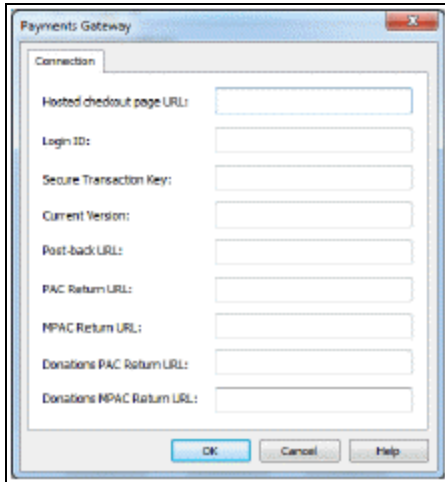


2. Double-click **Online Payments: Configure**. The Online Payments Settings dialog box opens.
3. Select **Payments Gateway** in the **Payment processing gateway** list.



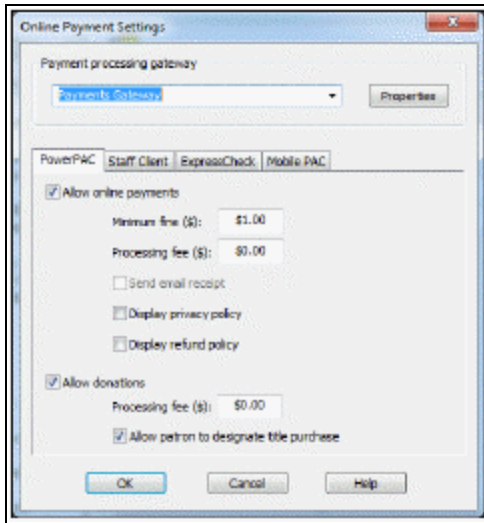


4. Click **Properties**. The Payments Gateway Properties dialog box opens.



5. Enter the following settings on the Connection tabbed page and click **OK**:
  - Hosted checkout page URL - The redirect page link to the Payments Gateway Hosted Checkout page (maximum 250 characters, alphanumeric). Obtain this setting from Payments Gateway.  
**Example:**  
**<https://sandbox.paymentsgateway.net/swp/co/default.aspx>**
  - Login ID - The API Log In ID generated on your Payments Gateway VT page (maximum 250 characters, alphanumeric). See [Set up the Payments Gateway SWP account](#).
  - Secure Transaction Key - The Secure Transaction Key generated on your Payments Gateway VT page (maximum 250 characters, alphanumeric). See [Set up the Payments Gateway SWP account](#).
  - Current Version - Payments Gateway Secure Web Pay API current version number (maximum 10 characters, alphanumeric). The current version is **1.0**.
  - Post-back URL - The Payments Gateway term for this is Return Page 1. Enter the post-back URL for your site (maximum 250 characters, alphanumeric):  
**<https://www.mylibrary.org/polaris/Payments/PostbackPaymentsGateway.aspx>**, where **[www.mylibrary.org/polaris](http://www.mylibrary.org/polaris)** is your PAC web site.
  - **Important:**  
Payments Gateway does not accept hyphens in the post-back URL (Return Page 1).

- PAC Return URL - Typically the Polaris PowerPAC patron account Fine & Fees page, displayed when the user clicks the return link on the Payments Gateway final payment transaction page (maximum 250 characters, alphanumeric):  
**https://www.mylibrary.org/polaris/patronaccount/finesfees.aspx**, where **www.mylibrary.org/polaris** is your PAC web site.
  - MPAC Return URL - Typically the Polaris Mobile PAC patron account Fine & Fees page, displayed when the user clicks the return link on the Payments Gateway final payment transaction page (maximum 250 characters, alphanumeric):  
**https://www.mylibrary.org/mobile/FinesAndFees/UpdateAccount**, where **www.mylibrary.org/mobile** is your Mobile PAC web site. This field is required. If you do not use Mobile PAC, simply enter your PAC Return URL.
  - Donation PAC Return URL - If you plan to accept donations, enter the URL of the Polaris PowerPAC page that should be displayed when the user clicks the return link on the Payments Gateway final payment transaction page (maximum 250 characters, alphanumeric). This URL is typically your Polaris PowerPAC home page. This field is required. If you do not plan to accept donations, simply enter your PAC Return URL.
  - Donation MPAC Return URL - If you plan to accept donations, enter the URL of the Polaris Mobile PAC page that should be displayed when the user clicks the return link on the Payments Gateway final payment transaction page (maximum 250 characters, alphanumeric). This URL is typically your Polaris Mobile PAC home page. If you do not plan to accept donations, or do not use Mobile PAC, simply enter your PAC Return URL.
6. To set up credit card payments from Polaris PowerPAC, be sure **Payments Gateway** is still selected in the Online Payments Settings dialog box, and follow these steps:
- a. Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.



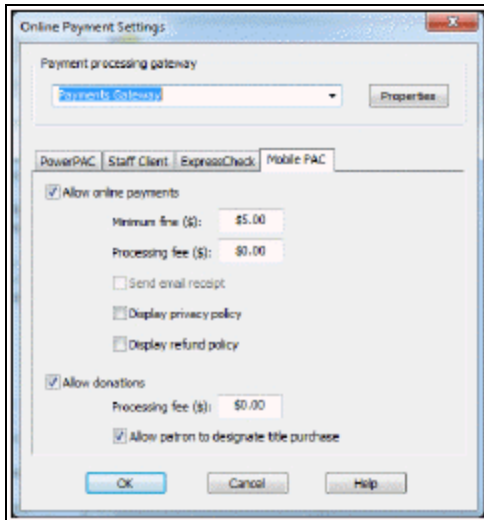
- b. Select **Allow online payments**. The payment options become available.

**Note:**

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See the Public Access Administration PDF Guide, Enable patron account access - PowerPAC.

- c. Set the minimum fine amount you want to accept by credit card payment. The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.
- d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e. To display a privacy policy link in Polaris PowerPAC, select **Display privacy policy**. See [Privacy and Refund Policy Display Options](#).
- f. To display a refund policy link in Polaris PowerPAC, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).
- g. To accept credit card payments for donations, select **Allow donations**.
- h. To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
- i. To allow donors to direct a donation toward a title purchase in a specific subject area, select **Allow patron to designate title purchase**. This option places an appropriate control on the PAC donations page, where the donor can specify a title purchase.

7. To set up credit card payments from Mobile PAC, follow these steps:
  - a. Click the **Mobile PAC** tab on the Online Payments Settings dialog box.



- b. Select **Allow online payments**. The payment options become available.

**Note:**

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the Mobile PAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See the Public Access Administration PDF Guide, Patron Account (My Account) in Mobile PAC.

- c. Set the minimum fine amount you want to accept by credit card payment. The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in Mobile PAC.
    - d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
    - e. To display a privacy policy link in Mobile PAC, select **Display privacy policy**. See [Privacy and Refund Policy Display Options](#).
    - f. To display a refund policy link in Mobile PAC, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).
    - g. To accept credit card payments for donations, select **Allow donations**.
    - h. To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.

- i. To allow donors to direct a donation toward a title purchase in a specific subject area, select **Allow patron to designate title purchase**. This option places an appropriate control on the donations page, where the donor can specify a title purchase.
8. Click **OK** to save your settings.

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## E-Commerce with Class Point of Sale

Active Payment Manager (Class Point of Sale) manages cash, check, and credit card payments for the library and other agencies in the network. When a payment is made through Class POS (from the Polaris staff client or by credit card from PAC), the transaction is recorded in the patron's account in Polaris.

**Note:**

If you are working in the Polaris staff client, you may be able to take credit card payments in Class Point of Sale, but processing takes place entirely within Class Point of Sale.

All system-defined Polaris fee reason codes (that is, codes equal to or less than 0) must be entered in the Class POS application as the "Third Party ID" for the corresponding Class POS item. Your Polaris Site Manager assists you in setting up these entries. This ensures that when a staff member selects an overdue item charge to pay in Polaris, for example, the Class POS software also identifies the reason for payment as overdue item.

Class POS software must be installed with the Polaris staff client on the workstation, but staff members do not need to start Class POS. You are prompted to log on to Class POS only once, at the first payment action in the Polaris staff client session.

You can take payments for overdue charges from the Patron Status workform - Account view or from the Check In workform. The Class POS interface automatically opens, and you can make the payment according to the library's policies. Payments for billed and lost items must be made from the Patron Status workform - Account view.

**Note:**

When you pay from the Check In workform, but cancel the transaction in Class POS, the charge remains on the patron's account but does not appear again on the Check In workform. At this point, you must pay the charge from the Patron Status workform - Account view.

Payment transactions at check-out and at check-in from the item record workform are not integrated with Class POS, so you may want to set the system-level Circulation

permission **Fines: pay fines at circ** so that staff are not allowed to pay fines through Polaris in these situations. Instead, the staff member creates a charge during the transaction, and then pays the charge from the Patron Status workform - Account view. For example, if the Overdue Fine dialog box appears at renewal, and the patron wants to pay the fine, the staff member selects **Charge Account** in the Overdue Fine dialog box, then pays the charge from the Patron Status workform - Account view. If the Patron Status workform - Account view is already open, you can refresh the workform (**F5**) to see and pay the charge. You can also refund a credit through Class POS from the Patron Status workform - Account view. When the Refund function is selected, the Class POS application is launched to process the refund and the transaction is recorded in both Class POS and Polaris. For more information about refunding a credit, see the Patron Services PDF Guide, Refund a credit amount.

Class POS does not handle payments from patron account credits or deposits. If your library relies on Class POS software and POS reports to reconcile the cash drawer with patron account transactions, you may want to prohibit deposit transactions in Polaris.

**Important:**

The effective interaction between Polaris and Class POS rests on charges, payments, and credit refunds being initiated in Polaris. It is possible to configure the Class POS interface independently of Polaris, and add options that might initiate a payment, charge, or refund from Class POS. However, Polaris interacts with Class POS as a payment manager only. For example, charges initiated and paid in Class POS can result in a credit transaction in the Polaris patron record that has no history in the Polaris database.

Polaris waive transactions are unaffected by the use of Class POS, and they are not registered or reported in Class POS.

You can accept credit card payments from the PAC through Class POS. To set up Polaris for Class POS credit card processing, you will need the following information from your Class POS representative: the URL to the Class online payment page for your site and the Class POS database identifier (Item ID) for online library fine payments.

See also:

- [Set up Class Point of Sale credit card payments](#)

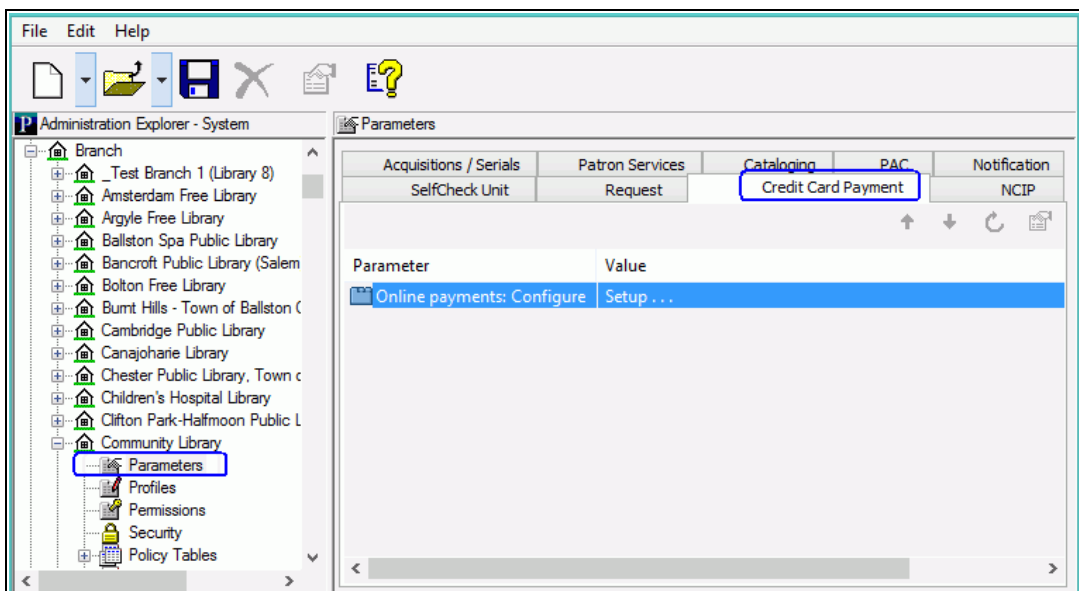
### **Set up Class Point of Sale credit card payments**

To set up credit card payments from the PAC if your library uses Class Point of Sale.

**Note:**

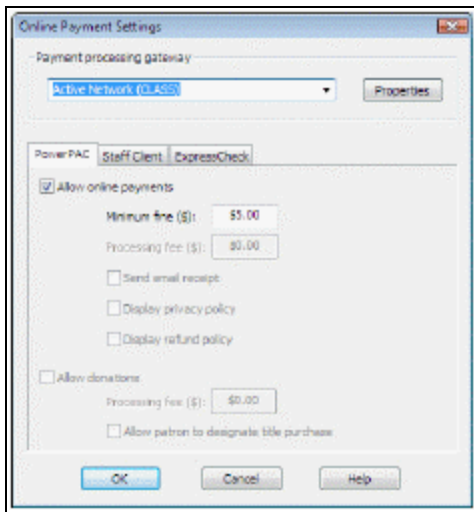
Credit card processing from Polaris ExpressCheck is not supported through Class Point of Sale. If you are working in the staff client, you may be able to take credit card payments in Class Point of Sale but processing takes place entirely within Class Point of Sale.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.

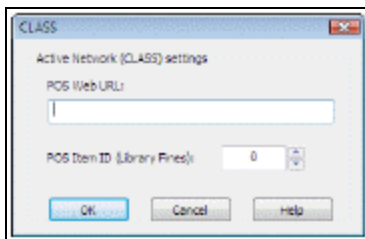


2. Double-click **Online Payments: Configure**. The Online Payments Settings dialog box appears.
3. Select **Active Network (CLASS)** in the **Payment processing gateway** list.





4. Click **Properties**. The Class properties dialog box opens.



5. Enter the following settings, and click **OK**:

- **POS Web URL** - The URL to the Class online payment page for your site.
- **POS Item ID (Library Fines)** - The Class POS database identifier for online library fine payments.

**Note:**

Obtain these settings from your Class POS representative.

6. Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.
7. Select **Allow online payments**.
8. Set the minimum fine amount you want to accept by credit card payment. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.
9. Click **OK** to save your settings.

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## E-Commerce with PayPal® Payflow Pro®

Polaris supports integrated credit card payment processing using the credit card processing service PayPal® Payflow Pro®. You can accept credit card payments from the staff client, Polaris PowerPAC and Mobile PAC, and Polaris ExpressCheck for charges on the patron account and donations to the library (PAC only). A separate license is required for each application. You can set up credit card processing at the system, library, or branch level; you can make separate settings for the staff client, PAC, and Polaris ExpressCheck.

To accept credit card payments with PayPal, your library establishes an account with PayPal directly, or with an e-commerce provider such as a bank that offers PayPal Payflow Pro payment processing.

To set up Polaris for PayPal Payflow Pro credit card processing, you will need the following information regarding the library's Payflow Pro account:

- Vendor (library) name, user name and password
- Partner code (PayPal or your e-commerce provider)
- PayPal's server name

See also:

- [Set up PayPal Payflow Pro credit card payments](#)

### Set up PayPal Payflow Pro Credit Card Payments

To set up credit card payment processing with the PayPal Payflow Pro service:

See also: [Test Values for Payflow Pro Processing](#) and [Credit Card Error Logs](#).

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.
2. Double-click **Online Payments: Configure**. The Online Payments Settings dialog box appears.
3. Select **PayPal's Payflow Pro** in the **Payment processing gateway** list.

4. Click **Properties**. The PayPal Properties dialog box opens to the Connection tabbed page.
5. Enter the following settings on the Connection tabbed page:
  - **Vendor** - Your library's main account name. Obtain this setting from PayPal or your e-commerce partner.
  - **Username** and **Password** - Obtain these settings from PayPal or your e-commerce partner. Once you have a username and password, you can set up others for the same account if you need to track manual transactions.
  - **Partner** - Enter your partner's code here (**PayPal** or your e-commerce provider).
  - **Timeout** - Set the number of seconds that should elapse with no action before the payment connection times out. The default is 30 seconds.
  - **Server** - Type **payflowpro.paypal.com** for live transactions, or **pilot-payflowpro.paypal.com** for testing purposes. See [Test Values for Payflow Pro Processing](#) for credit card values you can use for testing.

**Note:**

The **payflowpro.paypal.com** setting is typical, but may be different depending your bank.

6. Click the **Settings** tab, and enter the following information on the Settings tabbed page:
  - **Cancel SALE method** - This setting determines the appropriate automatic action (VOID or CREDIT) to cancel a SALE transaction. A sale may be canceled when it has been approved but fails AVS (Address Verification) and/or CVV2 (Card Verification Value 2) verification, or when a Polaris database error occurs. If a processor batch-processes sales transactions at the end of the day, a VOID transaction may be used to prevent the canceled SALE from settling. The library is charged only one transaction fee. However, some processors are host-based and do not use the batch method; in this case, all SALE transactions are settled immediately and a CREDIT transaction must be used to cancel the SALE. For these processors, the library is charged two transaction fees (one for the SALE and one for the CREDIT).

**Important:**

You must contact your processor or PayPal e-commerce account provider to determine if the processor uses the batch method or if they are host-based. If the processor uses the batch method, you must also verify that

SALE transactions can be voided. If so, you can select VOID for the Cancel SALE method and avoid paying two transaction fees. Most processors use the batch method. However, if the processor uses the host method, you must select CREDIT as the cancel sale method, and you will be charged two transaction fees when a sale is canceled. (Examples of host-based processors include PayPal and Global Payments Central.)

**Tip:**

Log files record errors, warnings, and information about credit card transactions.

- **E-Mail credit card processing errors to** - This option is highly recommended. Specify a staff e-mail address to receive automatic e-mail messages when a credit card transaction fails and staff intervention is required. The message includes details about the failure, so the staff member can then take action on the failed transaction, either contacting the patron or adjusting the Polaris patron record manually.

**Example:**

A patron's credit card is charged, but due to some type of error or processing rule, the transaction needs to be canceled or a partial credit needs to be applied. (This could be due to AVS or CVV2 failures or a database update error.) If the cancel or credit transaction fails, the patron credit card account is charged, but the transaction is not reflected in the Polaris patron record. A staff member needs to adjust the patron account.

- **AVS** - Address verification, a security measure that may be provided as part of your contract with your e-commerce partner. AVS matches the street address and Zip code on the Polaris payment form with the street address and Zip code in a credit card database that PayPal accesses. Select this option to use AVS. Then select a level of verification. For the following options, Y indicates the value matches, N indicates the value does not match, and X indicates that the cardholder's bank does not support the check:
  - Full** indicates that the street address must be Y and the Zip code must be Y (YY) or the transaction is declined. There can be no N values and no X values. Earlier versions of Polaris automatically used this level.
  - Medium** indicates that there can be no N values (YY, XY, YX, XX allowed).
  - Light** declines transactions only when both values equal N. All other combinations are accepted.

**Note:**

Occasionally AVS is faulty and a billing address, though correct, fails to be matched. In this case the user receives a message and the transaction is voided. If you find this is a problem, you may want to set the checking level to **Light** or clear (uncheck) the AVS option. Also note that the billing address that is displayed when the payment form opens is taken from the address information in the Polaris patron record, and may be different from the patron's credit card billing address. The billing address can be changed on the payment form. Once it is changed, it is not checked against the patron's record again during the transaction.

- **CVV2** - Card Validation Value 2, a security measure that may be provided as part of your PayPal contract with your e-commerce partner. This option requires the user to enter a code usually located on the back of the credit card. Select this option to use CVV2.
- **Pre-authorize SALE** - Available only when you select AVS and/or CVV2 verification. Select this option to AUTHORIZE a transaction before submitting the SALE transaction. An AUTHORIZE transaction returns an approval/decline without actually charging the cardholder's account for the full "sale." Set the amount to a small dollar amount such as \$1 (the default) to process the AVS and CVV2 information. If AVS or CVV2 fails, the cardholder is warned, and the actual charge is not placed on the credit card account. This eliminates the need for VOID/CREDIT processing of a SALE based on failed AVS or CVV2. If the AUTHORIZE transaction is approved and AVS/CVV2 passes all tests, then a SALE transaction is issued for the full amount. If a SALE is declined for the full amount, the new VOID or CREDIT option would be used to cancel the SALE transaction.

**Note:**

An AUTHORIZE transaction will still place a small hold (for example, \$1) on the credit cardholder's funds. Depending on the cardholder's bank, the hold may remain for 24 hours to a week. While this style of processing credit card payments can help reduce SALE issues based on AVS and CVV2 processing, it requires an additional transaction fee for every credit card payment.

7. Click the **Supported Credit Cards** tab.
8. Select the types of credit cards your provider supports, and click **OK**. The PayPal properties dialog box closes.

**Note:**

You can set the credit card types at the system, library, or branch level. The Supported Credit Cards tabbed page indicates the organization from which the settings have been inherited. If you make a change at the branch level, the branch name is displayed on the tabbed page. To revert to the settings of a higher level organization, clear all the checkboxes and click **OK**. Then open the tabbed page again. The settings of the higher level organization are displayed, and the name of the organization is displayed on the tabbed page.

9. To set up credit card payments from Polaris PowerPAC, follow these steps:
  - a. Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.
  - b. Select **Allow online payments**. The payment options become available.

**Tip:**

You can use this setting to prevent payments so small that they are offset by your e-commerce provider's transaction fees.

- c. Set the minimum fine amount you want to accept by credit card payment. The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.
- d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e. If you want patrons to receive an automatic payment receipt, select **Send email receipt**.
- f. The e-mail receipt lists each fine covered by the transaction. The patron can specify an e-mail address on the payment form. The sender's address is that specified in the PAC profile **Email notification: Email address of sender**.

**Note:**

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See the Public Access Administration PDF Guide, Enable patron account access - PowerPAC.

- g. To display a privacy policy link on the processing fee, payment, and payment verification pages in Polaris PowerPAC, select **Display privacy policy**. See [Privacy and](#)

[Refund Policy Display Options.](#)

- h. To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris PowerPAC, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).
  - i. To accept credit card payments for donations, select **Allow donations**.
  - j. To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
  - k. To allow donors to direct a donation toward a title purchase in a specific subject area, select **Allow patron to designate title purchase**. This option places an appropriate control on the donations page, where the donor can specify a title purchase.
10. To set up credit card payments from the staff client, follow these steps:
- a. Click the **Staff Client** tab on the Online Payments Settings dialog box.
  - b. Select **Allow online payments**.
  - c. Set the minimum fine amount you want to accept by credit card payment.
  - d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
  - e. To provide an automatic e-mail payment receipt to patrons, select **Send email receipt**. The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The staff member cannot specify an e-mail address during the payment process.
  - f. If staff workstations have credit card readers but you also want to allow manual data entry, select **Allow manual credit card data entry if card reader is attached**.
11. To set up credit card payments from Polaris ExpressCheck, follow these steps:
- a. Click the **ExpressCheck** tab on the Online Payments Settings dialog box.
  - b. Select **Allow online payments**. The payment options become available.
  - c. Set the minimum fine amount you want to accept by credit card payment.
  - d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
  - e. To provide an automatic e-mail payment receipt to patrons, select **Send email receipt**. The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The patron cannot specify an e-mail address during the payment process.

- f. To display a privacy policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select **Display privacy policy**. See [Privacy and Refund Policy Display Options](#).
  - g. To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).
12. To set up credit card payments from Mobile PAC, follow these steps:
- a. Click the **Mobile PAC** tab on the Online Payments Settings dialog box.
  - b. Select **Allow online payments**. The payment options become available.

**Note:**

Credit card payments for fines and fees are allowed from Mobile PAC if both the patron's registered branch and the Mobile PAC connection organization allow credit card payments.

**Tip:**

You can use this setting to prevent payments so small that they are offset by your e-commerce provider's transaction fees.

- c. Set the minimum fine amount you want to accept by credit card payment. The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in Mobile PAC.
- d. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e. If you want patrons to receive an automatic payment receipt, select **Send email receipt**. For fine receipts, the system uses the setting of the patron's branch. For donations (see step h below), the system uses the setting of the donation's receiving branch. The e-mail receipt lists each fine covered by the transaction. The patron can specify an e-mail address on the payment form. The sender's address is that specified in the PAC profile **Email notification: Email address of sender**.
- f. To display a privacy policy link on the processing fee, payment, and payment verification pages in Mobile PAC, select **Display privacy policy**. See [Privacy and Refund Policy Display Options](#).
- g. To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris Mobile PAC, select **Display refund policy**. See [Privacy and Refund Policy Display Options](#).
- h. To accept credit card payments for donations, select **Allow donations**.



- i. To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
  - j. To allow donors to direct a donation toward a title purchase in a specific subject area, select **Allow patron to designate title purchase**. This option places an appropriate control on the donations page, where the donor can specify a title purchase.
13. Click **OK** to save your settings.

### Test Values for Payflow Pro Processing

Use the values in the following tables to test Payflow Pro credit card transactions.

#### Credit Card Numbers

Use the following credit card numbers for testing. Any other card number produces a general failure.

Credit Card Type	Account Number
American Express	378282246310005
American Express	371449635398431
Amex Corporate	378734493671000
Australian BankCard	5610591081018250
Diners Club	30569309025904
Diners Club	38520000023237
Discover	6011111111111117
Discover	6011000990139424
JCB	3530111333300000
JCB	3566002020360505
MasterCard	555555555554444
MasterCard	5105105105105100
Visa	4111111111111111
Visa	4012888888881881

Credit Card Type	Account Number
Visa	422222222222

**Result Codes Resulting From Amount Submitted**

Amount	Result (RESPMSG)
\$0 - \$1000	0 (Approved)
\$1001 - \$2000	Certain amounts in this range return specific result codes. These can be generated by adding \$1,000 to that result code. For example, for result 13 (Referral), submit the amount \$1013. If the amount is in this range but does not correspond to a result code supported by this testing mechanism, result 12 (Declined) is returned.
\$2001+	12 (Declined)

Testing AVS - Address (AVSADDR)

Submitted Value for STREET	Example STREET Value	AVSADDR Result
000-333	24285 Elm	Y
334-666	49354 Main	N
667 or higher or begins with a non-numeric character	79232 Maple	X

Testing AVS - Zip (AVSZIP)

Submitted Value for ZIP	Example ZIP Value	AVSZIP Result
00000-50000	00382	Y
5001-99999	94303	N
Any value (if street address is 667 or higher or begins with a non-numeric character)	STREET=79232 Maple, ZIP=20304	X

Testing CVV2MATCH

CVV2 Value	CVV2MATCH Value
000-300	Y
301-600	N
601 or higher	X

### Credit Card Error Logs

Credit card log files track errors, warnings, and information about credit card transactions made with Payflow Pro. These are located in the following folders:

Staff client transactions -

**C:\ProgramData\Polaris\[version]\Logs\Polaris\_Errors\_[machine]\_[date].log**

Polaris PowerPAC transactions -

**C:\ProgramData\Polaris\[version]\Logs\POWERPAC\  
PowerPAC\_Errors\_[machine]\_[date].log**

Mobile PAC transactions -

**C:\ProgramData\Polaris\[version]\Logs\MOBILEPAC\  
MobilePAC\_Errors\_[machine]\_[date].log**

Polaris ExpressCheck transactions -

**C:\ProgramData\Polaris\[version]\Logs\ExpressCheck\_Errors\_[machine]\_[date].log**

If you set up automatic e-mail for errors that require staff intervention (see [Set up PayPal Payflow Pro credit card payments](#)), note that these are also included in the log files. Check the log files regularly to be sure that credit card processing is working properly.

**Note:**

The e-mail receipts sent to patrons for fine and Polaris Fusion payments also include a message if an error occurred that requires the patron to contact the library. Four language strings support this feature:

**PACML\_PAYMENT\_EMAIL\_FINESRECEIPT\_1063**

**PACML\_PAYMENT\_EMAIL\_FINESRECEIPT\_1064**

**PACML\_PAYMENT\_EMAIL\_FUSIONRECEIPT\_CONTACT**

**PACML\_PAYMENT\_EMAIL\_FUSIONRECEIPT\_SUCCESS**

You can view and edit the text in these language strings with Polaris WebAdmin (Language Editor). See the WebAdmin help file for more information.

### **Set up Google's reCAPTCHA on the PAC Donations page**

For libraries that use PayPal Payflow Pro for credit card payments through Polaris PowerPAC or Mobile PAC, Google's free reCAPTCHA feature adds human verification to the process of submitting a donation to the library. This minimizes the possibility of a robotic "user" making many small fake donations to the library to verify stolen credit card information. Genuine donors identify a picture or select **I'm not a robot** to continue with the donation process. For more information about reCAPTCHA, see <https://www.google.com/recaptcha/intro/index.html>.

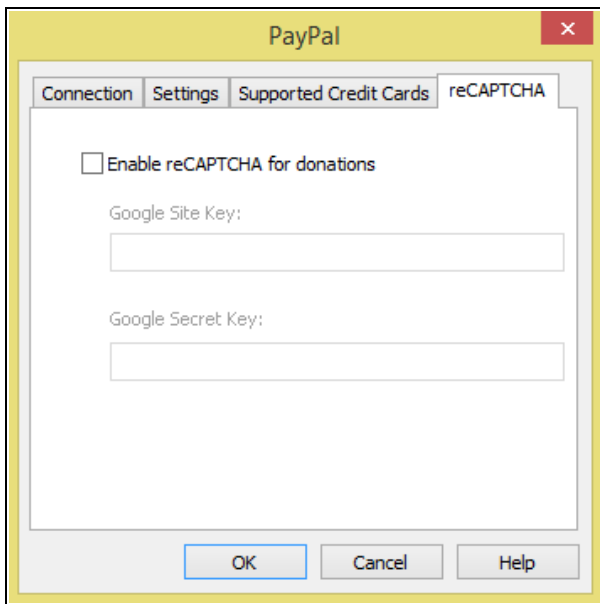
When reCAPTCHA is enabled, users cannot proceed past the first donations page in PowerPAC or Mobile PAC until they pass the reCAPTCHA test.

To implement reCAPTCHA, you will need a Google account. Using your Google account credentials, obtain your domain-specific site key and secret key from Google:

1. Go to: [www.google.com/recaptcha](http://www.google.com/recaptcha)
2. Select the **Get reCAPTCHA** button in the upper right corner.
3. Log in with your Google account email and password and follow the instructions.
4. Record your reCAPTCHA site key and secret key.

Next, set up reCAPTCHA in Polaris system administration. The reCAPTCHA settings are available at system, library, and branch levels:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.
2. Double-click **Online Payments: Configure**. The Online Payments Settings dialog box appears.
3. Select **PayPal's Payflow Pro** in the **Payment processing gateway** list.
4. Click **Properties**. The PayPal Properties dialog box opens.
5. Select the **reCAPTCHA** tab.



6. Select (check ) **Enable reCAPTCHA for donations**.
7. Type your site key in the **Google site key** field.
8. Type your secret key in the **Google secret key** field.
9. Click **OK**.

## Setting Up Circulation Workforms

You can customize the fields that appear on the Check Out and Check In workforms, so that only the information needed by your staff members is displayed. These options can be set at the system, library, or branch level using the Patron Services parameters **Check-out: Optional patron data** and **Check-in: Listview options**. The settings for the Check Out workform also apply to the patron data in the header of the Patron Status workform.

You can specify different fields for normal and bulk check-ins using the Check-In Listview options. The settings for bulk checkin also apply to the Receive Shipment workform available from the Acquisitions menu.

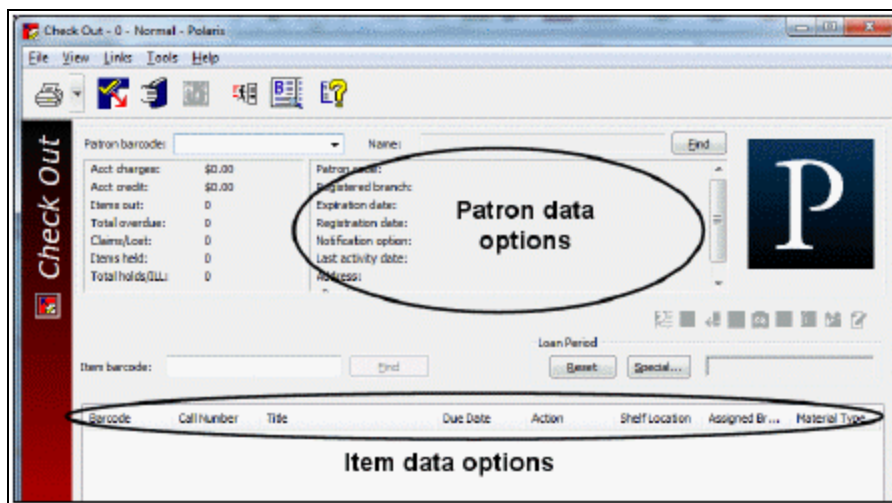
See also:

- [Setting Up the Check Out Workform](#)
- [Setting Up the Check In Workform](#)

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## Setting Up the Check Out Workform

You can customize the Check Out workform so that only the patron and item information needed by your staff is displayed. Patron data fields are displayed in the workform header. Item data is displayed in the columns of the item list view.



See also:

- [Set patron data fields for the Check Out workform](#)
- [Set item data fields for the Check Out workform](#)

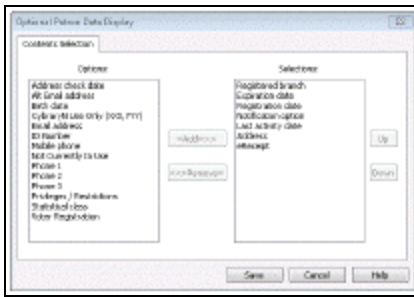
### Set patron data fields for the Check Out workform

To set which optional patron data fields appear, and the order in which they appear, in the header of the Check Out workform:

**Note:**

You can set these options at the system, library, or branch level. The settings you make here also control the patron data displayed in the header of the Patron Status workform.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-out: Optional patron data**. The Optional Patron Data Display dialog box appears.



3. To display a field in the Check Out workform header, select the field in the **Options** list and click **Add**. The options include the user-defined fields set up for your system. The field is placed in the **Selections** list.

**Note:**

If you select **eReceipt**, the field will be displayed regardless of whether you have enabled eReceipts for this organization. If eReceipts are enabled and you later decide to disable them, remember to remove the eReceipt option from the Check Out workform header. For more information about eReceipts, see [Setting Up eReceipts](#).

4. To move a field higher or lower in the workform header, select the field in the **Selections** list, and click **Up** or **Down**.
5. To remove a field from the workform header, select the field in the **Selections** list, and click **Remove**. The field is placed in the **Options** list.
6. Click **OK** on the dialog box. The Administration Explorer appears.
7. Select **File > Save**.

### Set item data fields for the Check Out workform

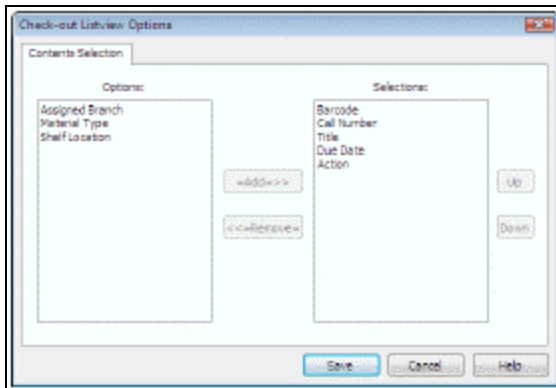
To set which item information appears, and the order in which it appears, in the list view of the Check Out workform:

**Note:**

You can set these options at the system, library, or branch level.



1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-out: Listview options**. The Check-out Listview Options dialog box appears.



3. To display a field in the item list view on the Check Out workform, select the field in the **Options** list and click **Add**. The field is placed in the **Selections** list, and will be displayed as a data column in the list view.

**Note:**

For serials, the title field includes issue information.

4. To move a column to the left or right in the workform list view, select the field in the **Selections** list, and click **Up** (left) or **Down** (right).
5. To remove a field from the list view, select the field in the **Selections** list, and click **Remove**. The field is placed in the **Options** list.
6. Click **OK** on the dialog box. The Administration Explorer appears.
7. Select **File > Save**.

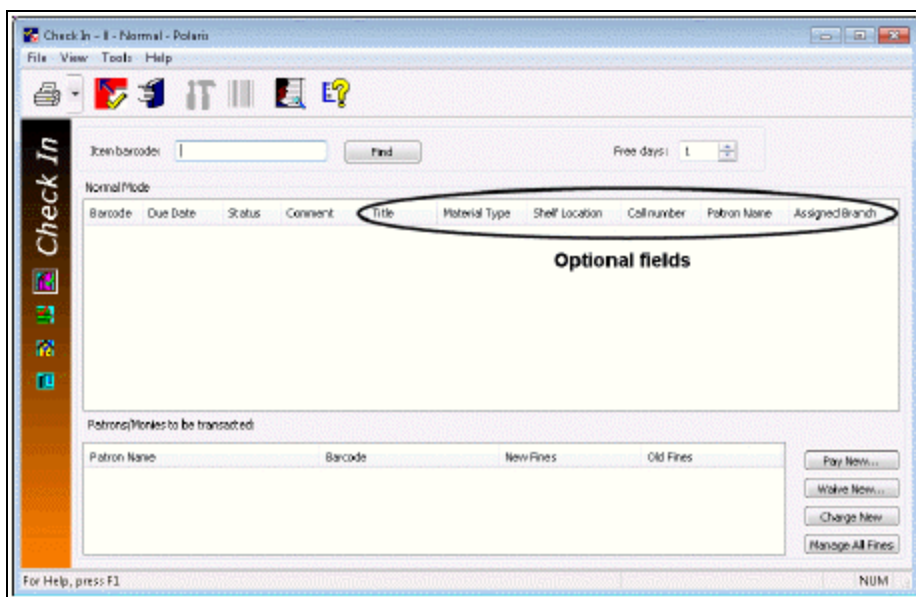
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## Setting Up the Check In Workform

Use the Patron Services parameter **Check-in: Listview options** to customize the Check In workform so that only the patron and item information needed by your staff displays in the workform. You can specify different fields for normal and bulk check-in.

### Note:

If your library sends enriched EDI orders using Polaris Acquisitions and receives and checks in shipments of shelf-ready barcoded materials, your settings for bulk check-in are also used for the Check-In Shelf-Ready Materials workform. See the Patron Services PDF Guide, Checking In Shelf-Ready Items.



See also: [Set Check In list view fields for patron and item data](#)

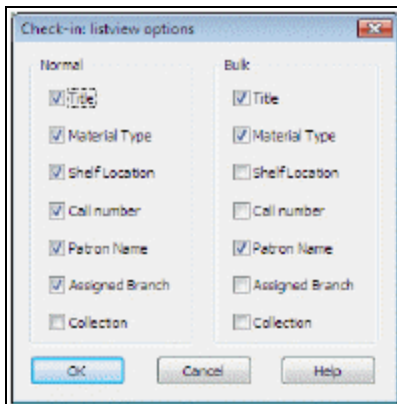
### Set Check In list view fields for patron and item data

To specify the information that appears in the list view of the Check In workform:

**Note:**

You can set these options at the system, library, or branch level.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-in: Listview options**. The Check-in listview options dialog box appears.



3. In the Normal column, select the fields (**Title, Material Type, Call Number, Shelf Location, Patron Name, Assigned Branch, Collection**) to display for normal check-in. The selected fields will be displayed as data columns in the Check In workform list view for normal check-in. The title field includes issue information for serials.

**Note:**

Select **Assigned Branch** if you allow circulation staff to change an item's barcode, circulation status, or shelf location from the Check In Workform. These operations can be performed only when an item's assigned branch is the same as the workstation's logged-in branch, so it is useful to know the assigned branches of the items in the Check In list view.

4. In the Bulk column, select the fields (**Title, Material Type, Call Number, Shelf Location, Patron Name, Assigned Branch, Collection**) to display for bulk check-in. The selected fields will be displayed as data columns in the Check In workform list view for bulk check-in.

These settings (except **Patron Name**) are also used in the Check-In Shelf-Ready Materials workform if your library sends Enriched EDI orders using Polaris Acquisitions and receives and checks in shipments of shelf-ready

barcoded materials. See the Patron Services PDF Guide, Checking In Shelf-Ready Items.

5. Click **OK** on the dialog box. The Administration Explorer appears.
6. Select **File > Save**.

## Setting Up Circulation Receipts

Polaris provides a number of printed receipts that you can configure to suit your library's policies. You can also enable eReceipts, so patrons can receive check-out, renewal, and fine receipts by e-mail or text message.

See also:

- [Setting Up Printed Receipts](#)
- [Epson® ReStick™ Printers - Hold and In-Transit Slips](#)
- [Setting Up eReceipts](#)

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## Setting Up Printed Receipts

Polaris provides the following printed circulation receipts and slips:

- Check-out/renewal receipt - Lists the items checked out or renewed for a patron during a circulation session. For set-up information, see [Set check-out receipt options](#).
- Items Out receipt - Printed from the Patron Status workform - Items Out view, this receipt lists all the items a patron currently has checked out. For set-up information, see [Set Items Out receipt options](#).
- Check-in receipt - Lists the items checked in for a patron or group of patrons. If items are selected from multiple patrons, the items are grouped by patrons, and three blank lines are added at the end of each group. If auto-cut receipt printing is enabled, the receipt is cut at the end of each patron's group of items. (Items with no patron information, for example those that went from In to In at check in, are also grouped together and separated from patron items.) For set-up information, see [Set check-in receipt options](#).
- Fine receipt - Lists the fines and fees paid or waived for overdue items, replacement items, and other fees for a patron. For set-up information, see [Set fine receipt options](#).
- Hold slip - Identifies a held item and the patron for whom the item is being held. Four types of hold slips are available:
  - Default hold slip - A hold slip prints automatically when an item's status becomes **Held** as a result of a circulation transaction (for example, the item is checked in). Libraries typically place the hold slip with the held material for identification purposes. The slip also prints when an ILL item is received on the Request Manager workform - ILL Requests view. For set-up information, see [Set hold slip options](#).
  - Hold call slip - For libraries that call their patrons for held items. It includes extended information and is laid out so that it can be folded to expose the title when placed in a book, with all the necessary patron information located below the fold. See [Enable hold call slips](#).
  - Hold/ILL pick-up slip - For libraries that allow patrons to pick up their own held items. This slip is inserted in the book so that the patron's name (in a specified

format) and the pick-up date are visible on the shelf. By default, this slip is printed horizontally on the receipt paper, and requires a line mode receipt printer such as a Star® TSP600, Star TSP700, or Dell™ T200. The settings for this slip also apply to an equivalent ILL pickup slip, printed when an interlibrary loan item is received. Vertical printing settings are also available. For set-up information, see [Set up hold pickup slips](#).

- In-transit slip - Prints automatically when an item's status changes to In Transit (because it belongs to another branch) or Transferred (because it will fill a hold and needs to be sent to the pick-up library) during a circulation transaction. You can also choose to print the in-transit slip only when the status changes to Transferred (see the Patron Services PDF Guide, Set the workstation to print receipts and slips). In Polaris Administration, you can choose the information to include on the slip and select the option to combine the in-transit and pickup slips. See [Set in-transit slip options](#).

**Note:**

When an item's status changes to Transferred to fill a request, the in-transit slip includes the text **FOR HOLD**. The text does not appear on in-transit slips printed when an item is checked in and just needs to be shipped back to its assigned branch.

In Polaris Administration, you also specify which printers are available for selection from staff client workforms, and you can specify receipt printer control codes for printer options such as bold type, in addition to the set of control codes that Polaris provides for specific receipt printers. See [Set receipt printer control codes](#).

**Important:**

You must also set up receipt or slip printing at each staff client workstation that generates receipts or slips. See the Patron Services PDF Guide, Setting Up Receipt Printing from Workforms.

**Note:**

Polaris also supports hold pickup and in-transit slips printed from Epson ReStick printers. See [Epson® ReStick™ Printers - Hold and In-Transit Slips](#).

### Set check-out receipt options

Check-out receipts always display the library name, date/time, type of receipt, item titles, and due dates. You can add any of the following information: call number (item); item

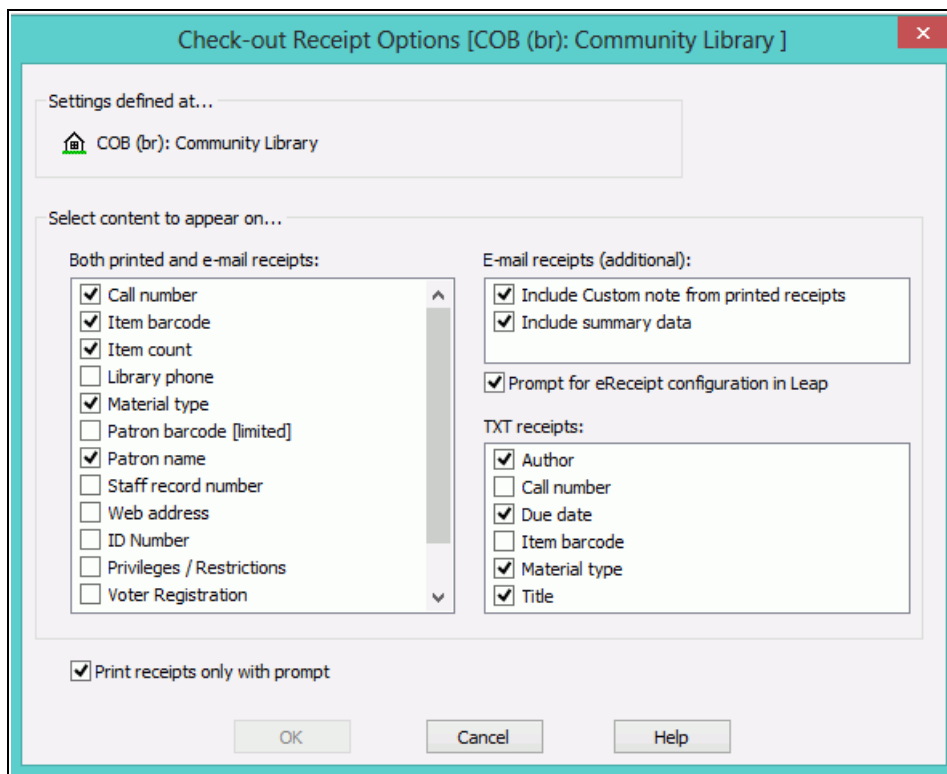
bar code; item count (total number of items); library phone number; material type; patron barcode (limited - last 5 digits of the patron barcode); patron name; staff record number (unique identification number from the staff member record); Web address (library URL defined in the organization record); any user-defined fields from the patron record.

To select additional information to appear on check-out receipts:

**Note:**

You can set these options on the system, library, or branch level. Your settings affect receipts generated from the staff client and from Polaris ExpressCheck, but do not affect offline check-out receipts. The offline information is fixed and cannot be changed in Polaris Administration.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-out: Receipt options**. The Check-out Receipt Options dialog box appears.





- To include a field in the check-out receipt, select the field in the **Both printed and e-mail receipts** list. User-defined fields are grouped together at the end of the list.

**Note:**

For more information about setting up eReceipts (e-mail and TXT receipts), see [Setting Up eReceipts](#).

- To include additional information on e-mail receipts, select **Include custom note from printed receipts** or **Include summary data**.
  - Include custom note from printed receipts:** allows you to type a custom note. On the circulation workstation, select **Circulation, Options** from the Polaris Shortcut Bar, and type the custom text in the Circulation Options dialog box - Receipt Printer Options tabbed page.
  - Include summary data:** automatically adds the following patron account information:
    - number of items currently checked out;
    - number of open requests (the total number of Hold requests with a status of Active, Inactive, or Pending, and the number of ILL requests with a status of Active or Inactive);
    - number of items (ILL or Hold) with a status of Held;
    - total amount of unpaid charges.
- To prompt for eReceipts when checking out in Leap, select **Prompt for eReceipt configuration in Leap**. If this checkbox is selected, and you check out a patron in Leap for whom eReceipts is set to None, the prompt appears and you can set up eReceipts for the patron right from check out. For more information, see Leap online Help.
- If you want to print a receipt only when the patron requests one, select **Print receipts only with prompt**. (If the option is not checked, no prompt is displayed and the receipt is always printed when check-out receipts are enabled for the workform.) This option applies only to online staff client operations; a checkout receipt with limited data is always printed during offline circulation.

**Note:**

You can enable e-mail or text message check-out receipts for patrons who prefer these to printed receipts. See [Setting Up eReceipts](#).

This option can reduce unnecessary printing. When the **Check out receipt option** is checked on the workform **Tools, Options** menu and the option to

prompt for the optional check-out receipt has been enabled for the workstation branch, the prompt to print a receipt is displayed when the **Enter** key is pressed to signal the end of the check-out transaction. The prompt to print the receipt is displayed during the following processes: normal and reserve item check out from the staff client Check Out workform; RFID check out; media dispenser unit check out; offline check out.

**Note:**

The receipt prompt is not displayed for renewals from the Patron Status workform - Items Out view. However, staff can optionally print a "receipt" from this view by suppressing check-out receipt printing from the workform **Tools** options, and then printing receipts on demand by printing the Items Out list. (**CTRL+ALT+P**). You can specify the information included in the printed version of the Items Out list. See [Set Items Out receipt options](#).

7. Click **OK** on the dialog box.

**Important:**

At each staff client workstation, you must enable the receipt from each workform that generates the receipt. See the Patron Services PDF Guide, Setting Up Receipt Printing from Workforms.

**Related Information**

- E-Receipts - Patrons can receive check-out and renewal receipts by e-mail or text message. See [Setting Up eReceipts](#).
- Custom note text - You can specify custom note text to appear on check-out, Items Out, and fine receipts. For details, see the Patron Services PDF Guide, Setting Up Receipt Printing from Workforms.
- You Saved message - You can add a "you saved" message to the check-out and/or renewal receipt. The message helps to remind patrons of the value of library service by displaying how much it would cost to purchase the items. For details, see [You Saved Receipt Messages](#).
- Bound-With receipts - See the Patron\_Services PDF Guide, Notices, Slips, Receipts and Other Data Displays.

## Set Items Out receipt options

Staff members can print a patron's Items Out list from the Patron Status workform - Items Out view. This "receipt" lists all the items a patron currently has checked out. The header of the Items Out list always includes the library name and date/time. You can include the following optional header data: author, call number, collection, due date, any custom note set for printed receipts, item's assigned branch, item barcode, item count, library phone, material type, limited patron barcode, patron name, renewals left, title, library Web address, and user-defined fields.

**Note:**

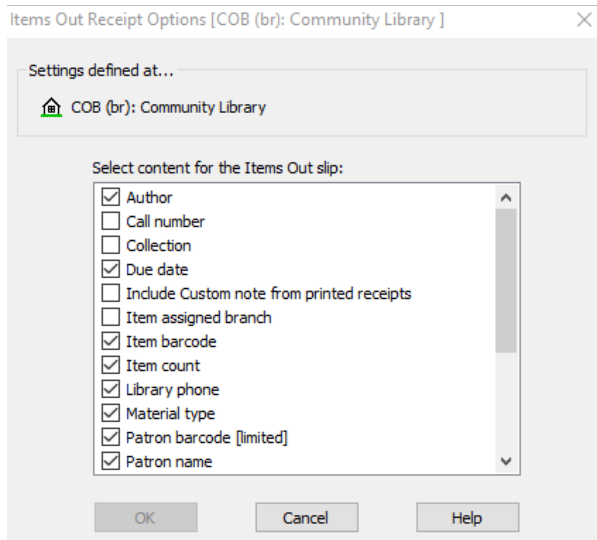
If you choose to print check-out receipts only when prompted (see [Set check-out receipt options](#)), the receipt prompt is not displayed for renewals from the Patron Status workform - Items Out view. However, staff can optionally print the Items Out "receipt" from this view by suppressing check-out receipt printing from the workform **Tools** options, and then printing receipts on demand by printing the Items Out list (**CTRL+ALT+P**).

To select additional information to appear on the Items Out list:

**Note:**

You can set these options on the system, library, or branch level. The system uses the settings for the workstation's log-on branch.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Items out receipt options**. The Items Out Receipt Options dialog box appears.



3. To include a field in the Items Out receipt, select the field in the **Select content** list. User-defined fields are grouped together at the end of the list.
4. Click **OK**.

### **Related Information**

- Custom note text - You can specify custom note text to appear on check-out, Items Out, and fine receipts. For details, see the Patron Services PDF Guide, Setting Up Receipt Printing from Workforms.
- **You Saved message** - You can add a “you saved” message to the printed Items Out list. The message helps to remind patrons of the value of library service by displaying how much it would cost to purchase the items. For details, see [You Saved Receipt Messages](#).

### **Set check-in receipt options**

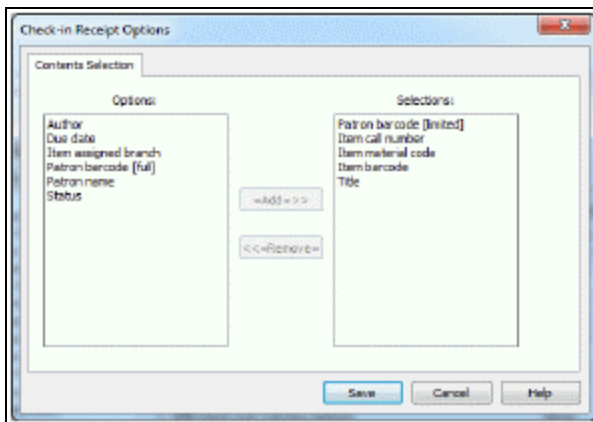
Check-in receipts can be printed from the Check In workform - Normal view and Check In workform - Bulk view. They include the item barcode, title, author, material type, call number, and patron’s limited barcode. The following information fields are also available for use: author, due date, item’s assigned branch, full patron barcode, patron name, status. You can set these options on the system, library, or branch level.

#### **Note:**

The Check In workform list view can also be printed on a receipt printer.

To set the information that appears on check-in receipts:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-in: Receipt options**. The Check-in Receipt Options dialog box appears.



3. To include a field in the check-in receipt, select the field in the **Options** list and click **Add**. The field is placed in the **Selections** list.
4. To remove a field from the check-in receipt, select the field in the **Selections** list, and click **Remove**. The field is placed in the **Options** list. To print check-in receipts, at least one field must be listed in Selections.
5. Click **Save** on the dialog box.

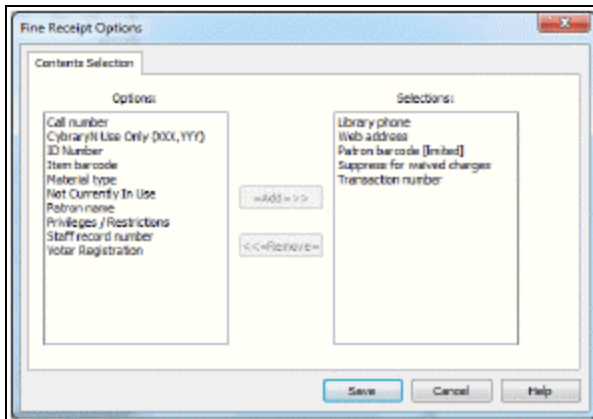
### Set fine receipt options

Fine receipts always display the library name, date/time, type of receipt, title, reason (from the charge transaction), the amount paid or waived, and total charges. You can add any of the following information: call number (associated item); item barcode; material type; patron name; library phone number; Web address (library URL); patron name; last 5 digits of the patron barcode; staff record number (unique identification number from the staff member record); any user-defined field from the patron record; transaction number (unique identifying number of the transaction). You can also set Polaris to print duplicate fine receipts if your audit policies require them. To select additional information to appear on fine receipts and enable duplicate receipts if required.

#### Note:

You can set these options at the system, library, or branch level.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Fine receipt options**. The Fine Receipt Options dialog box appears.



3. To print a field on the fine receipt, select the field in the **Options** list and click **Add**. The field is placed in the **Selections** list. (To remove a field from the fine receipt, select the field in the **Selections** list, and click **Remove**. The field is placed in the **Options** list.)

**Note:**

The options include any user-defined fields. If you add **Suppress for waived charges**, the fine receipt is not printed for only a waived transaction. However, if a transaction contains both payments and waives, the receipt is printed regardless of this setting.

4. Click **Save** on the dialog box.
5. To enable duplicate printed fine receipts for the organization, set the Patron Services parameter **Fine receipts: Print duplicate receipt** to **Yes**.

**Note:**

At each staff client workstation, you must enable the receipt from each workflow that generates the receipt. See Loading... this may take several minutes to complete..

**Related Information**

- E-Receipts - Patrons can receive fine receipts by e-mail or text message. See [Setting Up eReceipts](#).

- Custom note text - You can specify custom note text to appear on check-out, Items Out, and fine receipts. For details, see the Patron Services PDF Guide, Setting Up Receipt Printing from Workforms.
- Bound-With receipts - See the Patron\_Services PDF Guide, Notices, Slips, Receipts and Other Data Displays.

### Set hold slip options

Hold slips always display pickup location, date the item was trapped for the hold, held till (unclaimed) date, item title, item call number, item barcode, any display notes (in bold), and item's assigned branch. You can add any of these options to print on a hold slip:

- Patron name (if selected, this is printed in bold at the top of the slip)
- Last 5 digits of the patron barcode (**Limited patron barcode**)
- Patron phone (all phone numbers from the patron record)
- Patron address (home address from the patron record if available, otherwise the first available address in the patron record)
- Notification method
- Patron e-mail address
- Any user-defined fields from the patron record

**Note:**

If you add any user-defined fields and enable hold call slips (see [Enable hold call slips](#)), the fields you specified appear on the hold call slip.

The illustration shows an example.

**Tester, Louise A**  
**03434**  
**Unclaim : 3/21/2010**

Held date : 12/10/2009  
 Pickup location : Schenectady County Public Library - Central

Title : Ceramic tile: walls. [videorecording]  
 Call number : VC 643.7 CERA tape/bklt  
 Item barcode : 0000900176207  
 Assigned branch : Waterford Public Library

Address : 4 Main St  
 AMSTERDAM  
 NY 12010

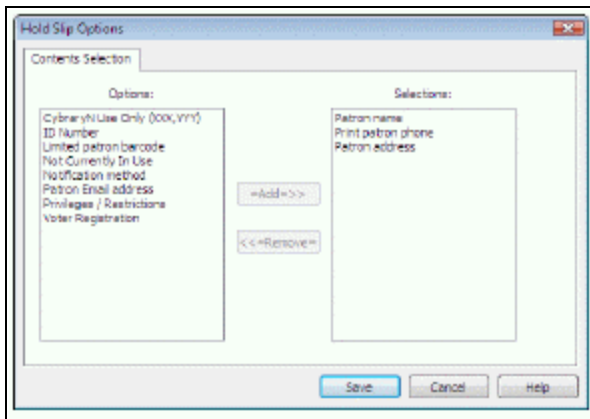
**Notes: Hold Display Note**

To select additional information to appear on hold slips.

**Note:**

You can set hold slip, hold call slip, and hold pickup slip parameters on the system, library, or branch level. For details about these slips, see [Setting Up Circulation Receipts](#).

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Hold slip options**. The Hold Slip Options dialog box appears.



3. To print additional fields on the hold slip, select the field in the **Options** list and click **Add**. The field is placed in the **Selections** list. (To remove a field from the



hold slip, select the field in the **Selections** list, and click **Remove**. The field is placed in the **Options** list.)

4. Click **Save** on the dialog box.

### Enable hold call slips

Hold call slips are specially-formatted hold slips that contain additional title information for libraries that manually call patrons. For details, see [Setting Up Printed Receipts](#). If you enable hold call slips, from any specific workflow, the hold slip, the hold call slip, or the hold pickup slip can be selected as the default hold “receipt,” but not more than one per workflow.

To enable the hold call slip:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Holds call slip: enable**, and select **Yes**.

#### Note:

If you specified user-defined fields for hold slips (see [Set hold slip options](#)), these appear on the hold call slip. All the other fields are fixed and cannot be customized in Polaris Administration.

The illustration shows an example.

```

Hold Call Slip

Title      : Christmas Eve; 13 stories. --
Author     : Brennan, Maeva.
Material   : Books.
Call number: Fic 9RE
Barcode    : 3361401222560

Held at    : Tualatin Public Library
Date held  : 09/07/2008
Hold until : 09/17/2008

Note:
Other items held:

Held for:
Patron     : FREDERICK, STEVE
Barcode    : 45955
Phone Number: 315 834-8482;
Address    : 8805 SW 62ND AVE
            PORTLAND
            OR 97223
Driver's license number: 5683440 DL
Contact name/Phone number: 503-350-8807 - ABC

Notification: Mailing Address
  
```

3. Select **File > Save**.

## Set up hold pickup slips

Hold pickup slips are formatted for libraries that allow patrons to pick up their own held items. These slips require a line mode receipt printer.

At the System level, you can set options to combine the hold pickup and in-transit slips or append hold call slip to the pickup slip.

To set up hold pickup slips:

### Note:

Your settings for the holds pickup slip also apply to the equivalent ILL pickup slip, which is printed when an interlibrary loan item is received.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Hold pickup slip options**. The Hold Pickup Slip Options dialog box opens.

3. Select **Enable Pickup Slip**.
4. Specify the patron identification to appear on the slip:
  - Select **Print full patron name** to print the entire name in this format: Last name (comma), First name (no comma) and Middle initial. Example: **Smith John T.**
  - **Print x characters of patron last name**, and set the number of characters to print the name in this format: First x number of characters of the last name (no comma) and the first initial of first name. Example: **Smit J**  
If the control is set to print only 1 character of the last name, only the first

character of the last name is printed, not the first or middle initial. If you chose to include the patron's name or limited characters, it is printed in bold, large characters at the top of the slip. If you do not check either option, no name appears on the slip.

**Note:**

Printer limitations restrict the name to approximately 38 characters, depending on the width of the characters and the printer model. Very long names may be cut off even if you specified the full patron name. If you set the number of characters to 1, only the first character of the last name is printed.

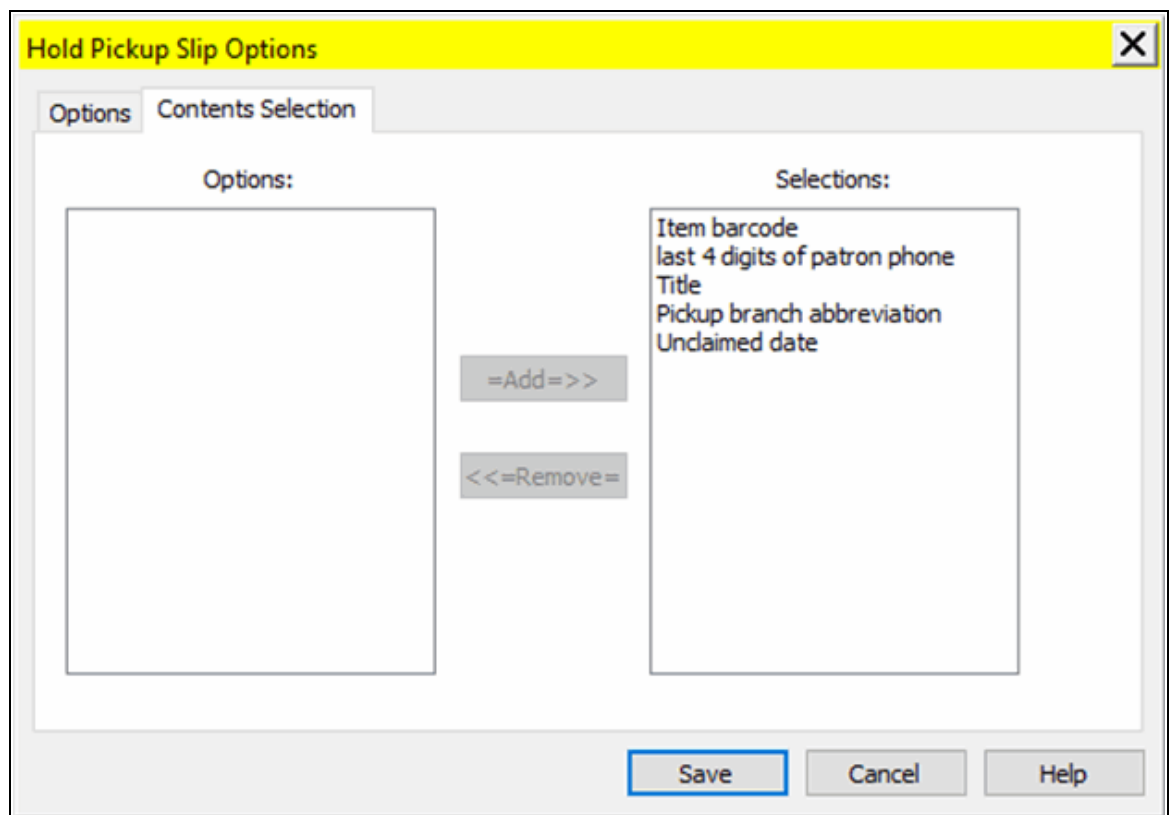
- To include a patron barcode on the slip, select **Print x digits of the patron barcode**, and specify the number of digits to print, counting to the left from the last digit of the barcode.

**Note:**

**Print x digits of the patron barcode** *must* be selected (checked) at the pickup branch to allow for the patron's barcode to print on the slip. See [Set in-transit slip options](#).

- To print the barcode in large print, select **Large print**.
5. Select a printing orientation for the slip:
    - **Horizontal** (default) - The hold pickup slip is inserted in the material, exposing the patron name and pickup date. The material is shelved so that the slip extends horizontally from the material.
    - **Vertical** - The hold pickup slip is a wrapper that is typically taped to the spine of the material. The pickup date is printed horizontally at the top and the patron's name is printed vertically down the slip. Any additional content is printed in small type under the pickup date.
    - **Tag** - The hold pickup slip is inserted into the material. When the slip is inserted, the patron name and pickup date are exposed at the top of the slip, printed horizontally, and the "tail" of the slip is inside the material. The material is shelved so that the slip extends above the material. Any additional content is printed in small type under the item barcode.
  6. Select a number in the **Trailing blank** spin control to specify the number of blank lines to insert on the right side or horizontal slips or the bottom of vertical slips.

7. Under **Hold slips combined**, select one of the following options:
  - **None** - This is the default. Hold slips are not combined.
  - **Combine hold pickup and in-transit slip** - When this option is selected at the System level, hold pickup and in-transit slips are combined.
  - **Append hold call slip to pickup slip** - When this option is selected at the System level, check the **Append call slip** checkbox. The option will be selected for all organizations in the system, but it can be unchecked.
8. To print additional fields on the hold pickup slip, click the **Contents Selection** tab. The Contents Selection tab displays the available options in the left column of the dialog box, and the selected options in the right column.



9. To add a field to be printed on hold pickup slips, select it in the **Options** column and click **Add** to add it to the **Selections** column. To remove a field, select it in the **Selections** column and click **Remove**.

- **last 4 digits of patron phone** - You can add the last four digits of the patron's phone number after the patron's name, in the same large font. The system uses the last four consecutive numeric characters of the **Phone 1** field in the patron record. If this field is blank, or if four consecutive numeric characters cannot be found, no number is printed.

**Examples:**

**315 634-4512 ext 123**

**634-4512 WORK**

In both cases, the system sees alpha characters in the last 4 characters and moves left until it identifies 4 consecutive numbers. The slip will print **4512**.

**634-4512 ex 1234**

The system identifies and prints **1234** because there are 4 consecutive numbers.

**451 ex.123**

The system cannot identify 4 consecutive numbers. No numbers will be printed on the slip.

- **Pickup branch abbreviation** - When selected, the pickup branch abbreviation is printed on all holds pickup slips, and on combination in-transit/holds pickup slips, regardless of format, at the top of the slip. On horizontal slips, the branch abbreviation is printed above the patron name in bold capital letters the same font size as the date. On vertical slips, it is printed above the "Pickup by" date, also in bold capital letters the same size as the date. On tag slips, it is printed above the patron name in the same size font as the "Pickup by" date.
- **Title** - When selected, the title is printed on the hold pickup slips.
- **Item barcode** - The full item barcode is printed.

**Note:**

Libraries that process items for holds centrally, sorting held items by pickup branch, may want to select the pickup branch abbreviation option to print at the top of the holds pickup slip for ease in sorting.

- **Unclaimed date** - The **Unclaimed date** is the date to pull the item from the shelf if it has not been picked up. The date is based on a time period defined by the pickup branch.

**Note:**

If your library is using a combined in-transit/hold pickup slip, this date is not available because the slip is printed when the item goes in-transit.

10. Click **OK** on the dialog box. The Administration Explorer (Parameters - Patron Services) appears.

**Note:**

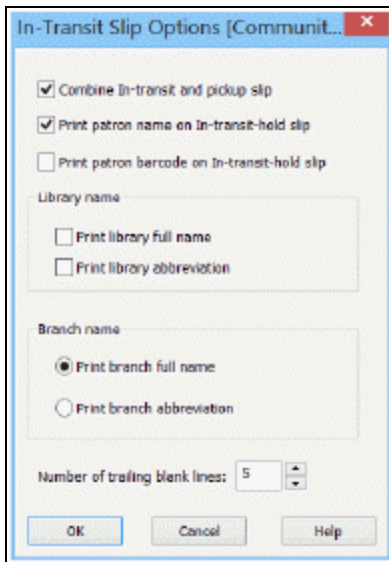
At each staff client workstation, you must enable the slip from each workform that generates the slip. See the Patron Services PDF Guide, Setting Up Receipt Printing from Workforms.

### Set In-Transit Slip Options

When a library uses a combined in-transit slip, the library's in-transit settings determine how information displays on the slip. For example, when an item is scanned at the original library, a combined slip prints containing the pickup branch name and the library name, in a format set per the original library's in-transit settings. The patron name and other contents for the pickup slip are determined per the pickup branch's setting.

To set information options for in-transit, in-transit for hold slips, or combination in-transit and pickup slips:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **In-transit slip options**. The In-Transit Slip Options dialog box opens.



3. To include a requesting patron's name on the slip, select **Print patron name on In-transit-hold slip**.
4. To include a requesting patron's barcode on the in-transit for hold slip, select **Print patron barcode on In-transit-hold slip**.

**Note:**

For the patron's barcode to display on the in-transit for hold slip, the pickup branch must have **Print x digits of the patron barcode** selected in **Hold Pickup Slip Options**. See [Set hold slip options](#).

5. (Optional) Select **Print library full name**, **Print library abbreviation**, or both to print the parent library of the destination branch. These options apply to all in-transit slips.
6. For the destination branch name, select **Print branch full name** or **Print branch abbreviation**. This option applies to all in-transit slips. You must select one option.
7. To control the length of the in-transit slip, select or type the number (0-999) of trailing blank lines to add to the slip.
8. Click **OK**.

**Note:**

At each staff client workstation, you must enable the slip from each workform that generates the slip. See the Patron Services PDF Guide, [Setting Up Receipt Printing from Workforms](#).

**Related Information**

Printing in-transit slips only for holds - Search Polaris help for "Set the workstation to print receipts and slips."

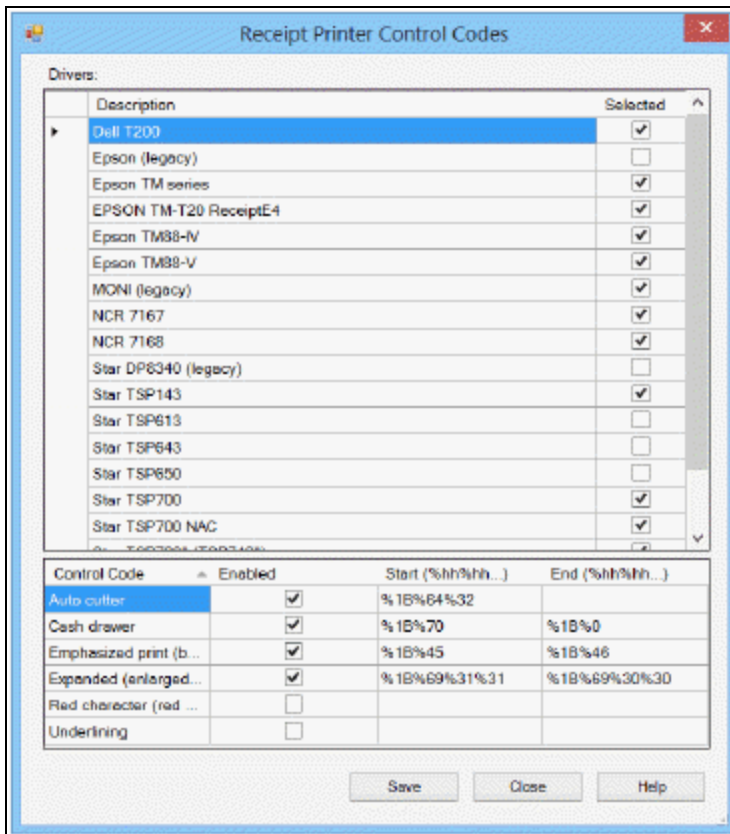
**Set receipt printer control codes**

To enable large print, bold print, red print, underlining, auto-cutting, or cash drawer for standard receipt printers, or to add other kinds of receipt printers to your system:

**Note:**

Install the appropriate printer drivers on the staff client workstations that use receipt printers.

1. In the Administration Explorer tree view, open the **Profiles** folder at the system level, and select the **Staff Client** tabbed page in the details view.
2. Double-click **Receipt printer control codes**. The Receipt Printer Control Codes dialog box appears.





3. If you use receipt printers already listed in the **Drivers** list, To set optional features for them:

**Note:**

Repeat these steps for each printer in your system.

- a. Select the printer in the **Drivers** list.
- b. Select the checkbox for each feature (such as expanded, bold, red, auto-cut, cash drawer) you want to enable for that printer.

A specific printer may not support all these features. If a feature is not supported, the **Start** and **End** code fields are blank.

**Note:**

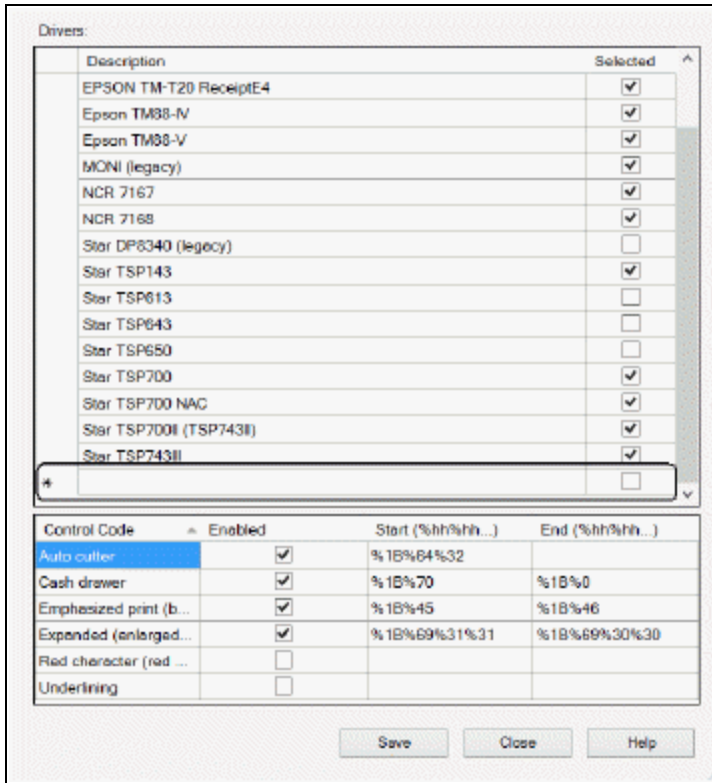
The **Expanded** setting affects in-transit and hold slips. On the in-transit slip, the destination branch's name is printed in a font that is twice as large as the font on the rest of the slip. On the hold slip, the patron's name and the unclaimed date are printed in the large font. Although you set this option for specific receipt printers, if you choose to print these slips on a page printer, the font is also enlarged.

- c. To list the printer for selection in Polaris workforms, be sure the **Selected** option is checked.
  - d. Click **Save**.
4. To add a receipt printer and enable special features for it, follow these steps:

**Note:**

You can add more than one printer. Repeat these steps for each printer you want to add.

- a. Scroll the **Drivers** list to the last blank field, which is marked by an asterisk.



- b. Select the blank field and type the printer name in the field.
- c. Click **Save**.
- d. Select your printer in the **Drivers** list, and select the checkbox for each feature you want to enable. Your printer may not support all features.
- e. For each enabled feature, select the **Start** and **End** code fields, and type the appropriate codes in the format shown.

See your printer documentation for the correct codes. Some models may require only a start code for some features.

**Note:**

If you select **Cash drawer**, the receipt printer must be connected to a cash drawer via an RJ11 connector that signals the cash drawer to open automatically when a receipt is printed. You can also set a staff client profile at the system, library, or branch level to open the cash drawer when a receipt is printed only if the payment was a cash payment. See [Set option to open the cash drawer only for cash fine receipts](#).

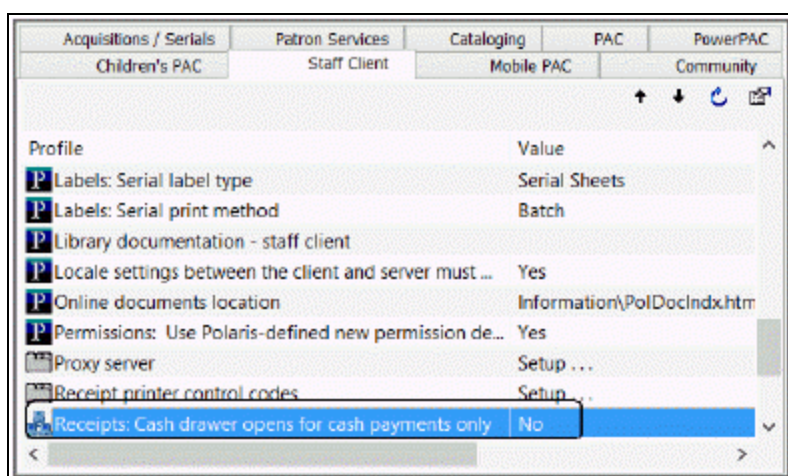
- f. To list the printer for selection in Polaris workforms, select the **Selected** option.
- g. Click **Save**.
5. To suppress an unused printer from the receipt printer list in Polaris workforms, clear (uncheck) the **Selected** checkbox for the printer.  
If you change multiple printers, you must click **Save** after each printer change.
6. Click **Close**.

### Set option to open the cash drawer only for cash fine receipts

The receipt printer must be set up in Polaris Administration at the system level to open the cash drawer automatically when a receipt is printed. See [Set receipt printer control codes](#). You can set an additional option at the system, library, or branch level that opens the cash drawer only when a fine receipt is printed and the payment method is cash, check, collection agency, or voucher. Fine receipts are still printed for credit card payments, but the cash drawer does not open.

To set the option to open the cash drawer only when fine receipts are printed for cash payments:

1. In the Administration Explorer tree view, open the **Profiles** folder at the system, library, or branch level, and select the **Staff Client** tabbed page in the details view.
2. Double-click **Receipts: Cash drawer opens for cash payments only**, and select **Yes**. The default is **No**.



If the receipt printer is set up to open the cash drawer automatically when a payment is made, and the **Receipts: Cash drawer opens for cash payments only**

is set to **Yes** for the organization at which the payment is made, the cash drawer will open only for the following types of payments:

- Cash
- Check
- Voucher
- Collection Agency

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## Epson® ReStick™ Printers - Hold and In-Transit Slips

Polaris can export hold pickup slip (“wrapper”) and in-transit slip data to Epson ReStick printers using the Epson Intelligent Label Service (ILS). This software allows the user to configure printed receipt formatting (font, orientation, data printed, etc.). It also allows the library to direct output to one or more specified printers. To support the integration, Polaris receipt output for these types of slips is converted to ANSI RAW instead of Unicode RAW, a header is added to the slip, and each data element is labeled for use by the Epson ILS. (The data labels are not printed.)

**Note:**

If the option to use the Epson ILS is selected, the Polaris Administration configuration options for in-transit and hold pick-up slips do not affect the Epson ReStick printer output. All other receipts are printed according to the configuration options set in Polaris Administration.

To enable receipt data export to the Epson ILS in Polaris Administration, set the Staff Client profile **Receipts: Support Epson ILS** to **Yes**. The profile is available at the system, library, branch, and workstation levels. When the profile is set to **Yes** for the workstation, only hold pick-up and in-transit slips are printed on the Epson ReStick printer. All other receipts (such as check-out receipts) are directed to other, non-ReStick printers, and are printed according to the configuration options set in Polaris Administration (see [Setting Up Printed Receipts](#)). If the profile is set to **Yes** but a different printer is chosen for the workstation, all circulation receipts and slips can be printed according to the configuration options set in Polaris Administration. However, hold and in-transit receipts will print the headers as they have been configured for Epson ILS, for example, **+++---Hold---+++**. See below. The header cannot be edited in Polaris.

**Note:**

When the profile is set to **No**, no slips can be printed on the Epson ReStick

printer. All circulation receipts and slips can be printed on other types of printers according to the configuration options set in Polaris Administration. See [Setting Up Printed Receipts](#).

When the profile is set to **Yes** and a hold wrapper or in-transit slip is printed, all the data associated with the receipt is sent to the Epson ILS, which configures which data prints, font, format, and orientation.

**Note:**

CJK, Arabic and other non-Western characters are not printed correctly.

For hold pickup slips, the following data is exported to the Epson ILS:

**Note:**

The Epson ILS controls which data is actually printed.

- Header text: **+++---HOLD---+++** [cannot be edited]
- Data field labels:
- Name - The patron name, Last, First MI. Referred to as User Name by the Epson ILS.
- Lib - Lib abbreviation
- Phone - Last 4 digits of patron phone
- Patron barcode - Patron barcode
- Pick-up by - Pickup date. Format: mm/dd/yyyy
- Item barcode - Item barcode
- Title - Item title

For in-transit slips, the following data is exported to the Epson ILS:

**Note:**

The Epson ILS controls which data is actually printed.

- Header text - **+++---IN-TRANSIT+++---** [cannot be edited]
- Data field labels:
- Name - The patron name, Last, First MI
- Pbarcode - Patron barcode
- LibraryName - Library name. Referred to as Location by some Epson clients.
- LibraryAbbrev - Library abbreviation

- BranchName - location [lower case is required]
- BranchAbbrev - location [lower case is required]
- From - Library name or abbreviation
- Hold for
- Title
- Material type
- Call number
- Item Barcode
- Assigned Branch

The following options for Polaris receipts do not apply to data exported to the Epson ILS:

- Trailing blank lines
- Orientation
- Large print

---

## Setting Up eReceipts

You can send eReceipts (e-mail and/or text message receipts) to patrons who prefer either of these options. They can be sent to patrons for check-outs, renewals, and paid fines from the staff client or Leap; renewals from PAC; check-out and renewals from Polaris ExpressCheck; and renewals from Polaris Phone Attendant (inbound telephony). No overnight processing is required, so these receipts are sent within a few moments of the transaction. All eReceipts are sent in plain text format. One checked out or renewed item is listed per text message (TXT) receipt to limit the length of the message.

**Note:**

eReceipts are not sent for offline staff client transactions.

To set up eReceipts to be sent to patrons in email or text message:

- [Enable eReceipts and specify their content](#) in Polaris Administration - eReceipts must be enabled for a patron's branch in order to select the eReceipt option in the Patron Registration workflow.
- [Select the eReceipt option on the Patron Registration workflow](#) > Addresses view (also available in Leap) for patrons who prefer to receive eReceipts.

### Patron Record Settings for eReceipts

Staff members set the **eReceipt option** on the Patron Registration workflow - Addresses view to specify the patron's preference for e-mail receipts, TXT message receipts, or both (**All**). The option is available if eReceipts have been enabled for the patron's branch.

You can set these options as default selections for normal and express patron registration. For more information about setting registration default values, see [Setting Patron Registration Required Fields and Defaults](#) and [Setting Express Registration Defaults and Requirements](#).

If a patron record specifies eReceipts, you can also choose to include the setting in the optional patron data that is displayed in the header area of the Check Out and Patron

Status workforms. For more information about selecting data to be displayed in these header areas, see [Setting Up the Check Out Workform](#).

### Leap and eReceipt Settings

When eReceipts are enabled for the branch and the patron receives only eReceipts, an alert appears in Leap when checking in, checking out or paying fines so that staff know not to wait for a printed receipt.

When staff enter a fine payment in Leap, the following message appears if the patron receives only eReceipts: **EReceipt submitted for fine payment.**

When checking out an item to a patron in Leap, the following message appears if the patron receives only eReceipts: **EReceipt submitted for check out/renewal.**

### Prompt for eReceipts in Leap

You can set an eReceipt prompt to appear in Leap when checking out items to patrons whose eReceipt option is set to **None** in the Patron Record > Notification options. The prompt also includes an option to enable eReceipts for the patron.

The eReceipt prompt, **Would you like to configure this patron to receive an eReceipt for this and future check-outs?** appears in Leap when:

- email or text message receipts have been enabled in the [EReceipt options](#) patron services parameter for the patron's registered branch and the Leap login branch;
- the **Prompt for eReceipt configuration in Leap** checkbox is selected in the [Check-Out Receipt Options](#) patron services parameter for the Leap login branch;
- and **None** is selected for the eReceipt option in the Patron Registration > Notification Settings in Leap.

### Fine eReceipts

Patrons receive e-mail or TXT receipts for fine payments if eReceipt options have been enabled for both the transacting workstation's branch and the patron's branch, and the patron record is set to receive e-mail receipts, TXT receipts, or both.

**Note:**

EReceipt features do not apply to credit card payments because e-mail receipts are sent for these payments as a separate process.



Staff members can print a fine receipt even if the patron receives an eReceipt. The **Tools, Options** menu on any workflow where staff members can take fine payments offers a fine receipt option: **only if no eReceipt**.

When eReceipts are enabled and **Fine receipt** is checked in the Options dialog box, the option **only if no eReceipt** is available. If the option is not checked, printed receipts are produced in addition to eReceipts for patrons who have opted to receive eReceipts. If **only if no eReceipt** is checked, fine receipts are printed only when the patron does not receive eReceipts.

**Note:**

The Options dialog box settings affect fine receipt printing only. A patron who has opted to receive eReceipts will always receive eReceipts for fines, regardless of these settings. For more information about setting up workstations for receipt printing, see the Patron Services PDF Guide, [Setting Up Receipt Printing from Workforms](#).

### Waive eReceipts

An eReceipt is sent for waived charges if all the conditions for sending a fine eReceipt are met, and if the **Suppress for waived charges** option (Patron Services parameter - **Fine receipt options**) is not selected for the workstation's branch. A receipt for waives is printed in addition to the eReceipt if all the conditions for printing a fine receipt are met (see [Fine eReceipts](#)) and if the **Suppress for waived charges** option is not selected for the workstation branch.

### eReceipt Options in Polaris PowerPAC and Mobile PAC

If the patron's registered branch has enabled eReceipts (see [Set up eReceipts](#)), that organization can also offer the option to receive e-mail receipts, TXT receipts, or both in patron self-registration or account updates from PAC. To enable eReceipt preference options in PAC, use the PAC profile **Patron eReceipts**, available at the system, library, or branch level.

In the PAC, the patron can then select e-mail receipts, TXT receipts, or both, as enabled by the registered branch. The patron will receive eReceipts for renewals from PowerPAC and Mobile PAC if this option has been enabled for the patron's registered branch (see [Set up eReceipts](#)), and check-out and fine eReceipts if both the check-out branch and the patron's branch have enabled eReceipts.

**Important:**

The eReceipt options are available for patron account updates from PAC

only if you also allow patrons to update the e-mail address or phone number from PAC. These settings are available in the PAC profile **Patron access options**. For details, see [You Saved Receipt Messages](#).

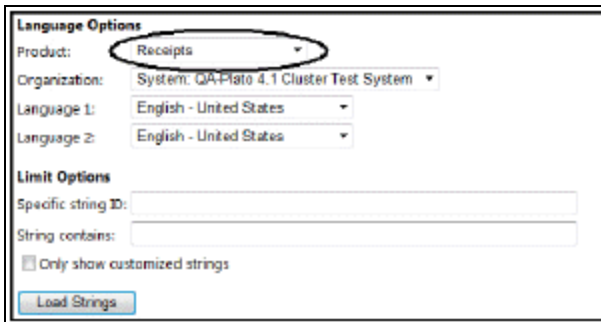
### Editing eReceipt Content in Polaris Language Editor (WebAdmin)

Your settings for the check-out branch determine the content of e-mail receipts and TXT receipts. For e-mail receipts, the **From** field is determined by the PAC profile **Email notification: Email address of sender**. The subject line, introduction, and footer text can be modified in Polaris WebAdmin (Language Editor). For TXT receipts, the subject line and footer text can be modified in Polaris WebAdmin.

**Note:**

Use the Patron Services parameter **Check out receipt options** to specify the optional additional data fields for e-mail receipts and TXT receipts. See [Set up eReceipts](#).

Polaris WebAdmin includes a **Receipts** “product.” Select this product to edit the content of e-mail and TXT receipts.



The table lists the string IDs. For more information about using Polaris WebAdmin, see WebAdmin online Help.

Receipt Type	Mnemonic (String ID)	Default Text	Context
E-Mail Check-Out Receipts	RECEIPT_CHECKOUT_EMAIL_SUBJECT	Checked-out from your library	Subject
	RECEIPT_	The following	Introduction

Receipt Type	Mnemonic (String ID)	Default Text	Context
	CHECKOUT_EMAIL_INTRO	items were checked out by you on [DATE] from [BRANCH]	
	RECEIPT_EMAIL_FOOTER	Please do not reply to this message.	Footer
E-Mail Renewal Receipts	RECEIPT_RENEWAL_EMAIL_SUBJECT	You renewed library items	Subject
	RECEIPT_RENEWAL_EMAIL_INTRO	Items renewed on [DATE].	Introduction
Text Message Check-Out Receipts	RECEIPT_CHECKOUT_TXT_SUBJECT	Checked-out from your library	Subject
	RECEIPT_TXT_FOOTER	Access your library account for additional information.	Footer
Text Message Renewal Receipts	RECEIPT_RENEWAL_TXT_SUBJECT	You renewed library item	Subject

### You Saved Messages in eReceipts

You can add a “you saved” message to check-out and/or renewal eReceipts. The message helps to remind patrons of the value of library service by displaying how much it would cost to purchase the items. For details, see [You Saved Receipt Messages](#).

## Logging eReceipts and Reporting Failures

E-mail and TXT receipt messages are logged in the Polaris Transactions database, and failures are included in the **Receipt delivery failure report**. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and open the **Circulation** folder in the Polaris Reports window. For a specified time period and organizations (sending branches), the report lists the transactions where an e-mail or TXT receipt failed to be sent for a check-out or renew transaction. For more information, see Circulation Reports.

## Enable eReceipts and specify their content

To enable eReceipts and specify their content:

1. Confirm that the following e-mail prerequisites are set up for the organization:
  - In Polaris Administration, set the PAC profile **Email notification: Server running SMTP service** for the organization. Use the computer name where the SMTP service is installed.
  - Set up reverse DNS in Active Directory for your network. Reverse DNS is used to authenticate a sender's address with the domain. This step helps ensure your patrons will receive their e-mail receipts. As a security measure, certain Internet service providers block e-mail to their users if they cannot find the sending server.

### Note:

These settings are also necessary for e-mail notification. See [Delivering Notices By E-mail](#).

2. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view. The parameter is available at the system, library, or branch level.
3. Double-click **EReceipt options**. The EReceipt Options dialog box opens.
4. Check **Enable e-mail receipts**, **Enable TXT receipts**, or both. When at least one option is selected for the patron's branch, you can [select the eReceipt option in the Patron Registration workflow](#).

### Note:

eReceipts must be enabled for both the patron's branch and the

check-out (log-on) branch in order for the patron to receive the check-out eReceipt.

5. To enable renewal eReceipts from PAC, check **Send receipts for renewal from PAC**. For more information about eReceipt options in PAC, see [eReceipt Options in Polaris PowerPAC and Mobile PAC](#).

6. Click **OK**.

7. Set the optional content for eReceipts:

**Note:**

Your settings for the check-out branch determine the content of e-mail receipts and TXT receipts.

8. Double-click the Patron Services parameter **Check out receipt options**. The Check-out Receipt Options dialog box opens. Options checked in the left column apply to both printed and e-mail receipts. See also: [Set check-out receipt options](#).
9. If you want to include additional content for e-mail receipts, select **Include Custom note from printed receipts** or **Include summary data** in the **E-Mail receipts (additional)** list. The custom receipt note is set up on the circulation workstation, from the Polaris Shortcut bar.
  - **Include custom note from printed receipts:** allows you to type a custom note. On the circulation workstation, select **Circulation, Options** from the Polaris Shortcut Bar, and type the custom text in the Circulation Options dialog box - Receipt Printer Options tabbed page.
  - **Include summary data:** automatically adds the following patron account information:
    - number of items currently checked out;
    - number of open requests (the total number of Hold requests with a status of Active, Inactive, or Pending, and the number of ILL requests with a status of Active or Inactive);
    - number of items (ILL or Hold) with a status of Held;
    - total amount of unpaid charges.
10. In the **TXT receipts** list, check the content options for the TXT receipt. Because text messages must be brief, the set of content options for TXT receipts is separate and more limited than the content options for printed and e-mail receipts.

**Note:**

Subject, introduction, and footer text for eReceipts can be customized in Polaris Language Editor (WebAdmin). See [Patron Record Settings for eReceipts](#).

11. Click **OK**.

Related Information

- Polaris ExpressCheck eReceipts for check out and renewal - Use the SelfCheck Unit parameter **Polaris ExpressCheck: Options**. Check the **Enable eReceipts** option. Once this option is checked, the patron will receive eReceipts if both the patron's branch and the ExpressCheck workstation's branch have enabled eReceipts in the **EReceipt options** parameter, and an eReceipt option is set in the patron's record. The eReceipt is sent when the patron selects **Exit** in Polaris ExpressCheck.
- Printed receipts - See [Setting Up Printed Receipts](#).
- Bound-With receipts - See the Patron\_Services PDF Guide, Notices, Slips, Receipts and Other Data Displays.

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## You Saved Receipt Messages

You can add a “you saved” message to printed and email check-out/renewal receipts and the printed Items Out list. The message helps to remind patrons of the value of library service by displaying how much it would cost to purchase the items. It includes the total value of the current receipt transactions, the value of the patron's year-to-date transactions, and the “lifetime” value of all the patron’s transactions.

The value for each item is calculated based on the retail price stored in the item record. If the item doesn't have a price, you can opt to use the Replacement Fee default value for that material type. You can also choose to suppress the message if the value is below a specified dollar amount.

**Note:**

The You Saved message option does not apply to text message receipts, and it cannot be activated or suppressed for individual patrons.

- **Staff client** - When the You Saved message is implemented at the check-out workstation branch, the value is calculated for all items, regardless of item or patron branch. The message is included on check-out receipts generated from the staff client Check Out workflow and (if the branch has opted to include renewals in the calculation) renewals from the Patron Status workflow. If the organization has opted to print the message on the Items Out slip, the message also appears when the Items Out slip is printed from the Patron Status Items Out list view.
- **Leap** - When the logged-on user's branch has implemented the You Saved message, the message is included on receipts generated from the Leap Check Out workflow (check out or renewal) and from the patron Items Out view (renewal).
- **Polaris PowerPAC and Mobile PAC** - Settings for the patron’s registered branch control whether the You Saved message appears on email receipts for items renewed from PAC. To enable the message on email receipts for items renewed from PAC, check **Send receipts for renewal from PAC** in the Patron Services parameter **EReceipt options**, then enable You Saved receipt messages (see [Set up You Saved receipt messages](#)).

- **Polaris ExpressCheck** - When the You Saved message is implemented at the ExpressCheck workstation's parent branch, the value is calculated for all items, regardless of item or patron branch. If the ExpressCheck station is configured to print one receipt per item (**Parameters > SelfCheck unit > Polaris ExpressCheck Options**), then only one item will be included in the receipt tally.
- **SIP Self-Check Units** - You can include the You Saved message on printer messages, screen messages, or both. The message is added to the existing check-out and renewal messages (if you have opted to include the message for renewals). The system uses the settings of the organization associated with the self-check unit's SIP Service Port.

See also:

- [Customizing the You Saved Message](#)
- [Year-To-Date and Lifetime Savings in the Patron Record](#)
- [Processing the Year-to-Date Amount](#)
- [Set up You Saved receipt messages](#)
- Patron Services PDF Guide, Set SIP self-check parameters topic

### Customizing the You Saved Message

The default You saved message is **You just saved [Value] by using your library. You have saved [YTDValue] this past year and [LifetimeValue] since you began using the library!** Use Polaris Language Editor (WebAdmin) to customize the You Saved message. Select the Receipts "product." The message mnemonic is RECEIPT\_YOUSAVED. To include monetary values, do not edit the text in brackets. The message is truncated to 255 characters. For more information about editing messages, see WebAdmin online help.

### Year-To-Date and Lifetime Savings in the Patron Record

Year-to-date and lifetime savings values are available in the Polaris staff client patron record properties sheet. In the staff client, select the **Properties** icon or press F8 on the Patron Registration or Patron Status workform to view the patron record properties sheet.

In Leap, year-to-date and lifetime savings values are available in the Misc. Info section of the patron record.



## Processing the Year-to-Date Amount

Previous year-to-date values are saved in the PrevYearYouSavedAmount table, which is populated when the circulation year-end rollover job runs. Table columns include PatronID (int) and YTDYouSavedAmount (money). The Circ\_YearEndCircCountRollover job script rolls over the new YTDYouSavedAmount field from the patron record into the PrevYearYouSavedAmount table and then zeroes out the YTDYouSavedAmount value in the patron record.

## Set up You Saved receipt messages

To set up You Saved receipt messages:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization (system, library, or branch), and click the **Patron Services** tab in the details view.
2. Double-click **You Saved Receipt Options**. The **You Saved Receipt Options** dialog box opens.
3. Select **Include message on printed and e-mail receipts** to add the You Saved message to these checkout receipts.
4. Select **Include message on Items Out slip** to add the You Saved message to the Items Out list (printed from the Patron Status workform and from Leap patron Items Out view).
5. (System level only) Select **Use default replacement fee when item price is unavailable** to use this value for items with no price in the item record. (Default replacement fees are set with the Patron Services parameter **Replacement fee options**.) If you leave this option unchecked and the item record does not include a price, the item is not included in the You Saved calculation.
6. (System level only) Select **Include renewals in total value** to include the value of renewed items in the You Saved calculation.
7. If you want to set a minimum You Saved value to trigger the You Saved message, enter the value in the **Minimum total value to print** box. If the value is below the minimum setting or the sum is 0, no message appears. The default value is \$0.01; in this case, the receipt includes the You Saved message regardless of the calculated You Saved amount.
8. Click **OK**.

***Related Information***

- **You Saved message overview** - [You Saved Receipt Messages](#)
- **You Saved message for SIP self-check receipts** - [Set SIP self-check parameters](#)

## Item Record Circulation Settings

Circulation settings for item records are controlled by a Polaris Administration policy table, database table, and patron services parameters. The Material Types policy table defines standard descriptions and the banner text displayed in Leap for specific items held by the library; the Circulation Statuses database table defines standard labels for item circulation statuses; the **Shelving status options** parameter controls an option to display a temporary shelving status; and the **Last use patron display** parameter controls whether to display a link to the last patron who checked out the item.

In addition, if your library uses NCIP, you should map item material types to the NCIP medium types defined by the NCIP standard. Search Polaris help for "Mapping NCIP Data to Polaris Data."

For more information about items that can float from one branch to another, see [Setting Up Floating Collections](#).

See also:

- [Defining Material Types](#)
- [Viewing Circulation Statuses and Editing Descriptions](#)
- [Setting Shelving Status](#)
- [Displaying an Item's Last Borrower](#)

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## Defining Material Types

The Material Types policy table contains the material types held by your library and the minimum age required to check out or place a hold on those items. Material types are key elements in determining loan periods, lending limit blocks, hold policies, and age-related blocks. They are also use in generating statistics.

Material types appear in the following locations:

- In the **Material type** list box on the Item Record workflow, the Serial Holdings Record workflow, the Selection List Line Item workflow, the Purchase Order Line Item workflow, and the Invoice Line item workflow
- In the PAC availability information for each item associated with a title
- As search limiting options in the staff client Find Tool and the PAC

The same entries are displayed for every organization level at which the Material Types table is opened. Material types can be set from the system, library, and branch levels, but additions and changes are applied to all organizations. You cannot delete a material type from the table in Polaris Administration. Contact your Innovative Site Manager or your system administrator to change the Material Types table using the Query Analyzer in SQL Server.

The Material Types table is displayed from the Administration Explorer only. You cannot access the Material Types table from an organization workflow.

**Note:**

These System Administration permissions are required to modify the Material Types policy table: **Access administration: Allow, Access tables: Allow, Modify material types table: Allow.**

See: [Add a material type entry](#).

### Add a material type entry

To add a material type to the Material Types policy table:

**Important:**

The new material type is available to all organizations.


1. Select **Administration > Explorer > System > Policy Tables > Material Types**.

**Tip:**

To see the material type code, expand the first column by dragging the column header separator to the right.

The Material Types table appears in the details view.

Description	Minimum Age
Book	18
New / Popular Book	0
Video	18
Children's Video	0
Audiobook	0
Music	0
Periodical	0
Rental	0
Software	0
Kit - Audiovisual	0
Kit - Realia	0
Equipment	0
Art	20
Picture, Photo	0
Kellie Rental Score	0
Kellie Rental Manuscript	0
Kellie R-Rated Realia	18
Vertical Files & Material	0
Map	0
Book and CD	18
Museum Pass	0

2. Click  to add a material type.

The Insert Material Types dialog appears.

Insert : Material Types


Description:

Minimum Age:

OK Cancel Help

3. Type the text describing the material type in the **Description** box.  
This text appears in the staff client, Leap, and in PAC.
4. If you want to restrict checkouts and holds requests for this material type to a minimum age, enter a value in the **Minimum Age** box. Otherwise, leave the default value of "0".  
For more information on this feature, see "Using Age-Related Loan Policies" in the Leap documentation.
5. Click **OK** on the dialog box. The new entry is added to the table, and the status bar indicates the modification is pending.
6. Select **File > Save**.  
The status bar indicates the record is saved.

#### Related Information

- Modify a table entry - Select the existing material type entry and click . Changes affect all organizations and records using the original entry.
- Material type for quick-circ items - Using Polaris Quick-Circ, you can circulate items that are not intended for full cataloging and generate circulation statistics for these items. Your policy may be to use any available and appropriate material type for quick-circ items, or you can set up a material type specifically for this use. See [Add a not-supplied reasons entry](#). To set a default material type for quick-circ item records, double-click the Patron Services parameter **Quick-circ: Material type**, and select a material type from the list. For more information about creating and using quick-circ items, see the Patron Services PDF Guide, Circulating Ephemeral Items.

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## Viewing Circulation Statuses and Editing Descriptions

One common set of circulation statuses is used in item transactions from any branch in the system. The Circulation Statuses database table, available only from the Administration Explorer, identifies the standard names for item circulation statuses.

Although the circulation status entries are owned by the system level, you can view the table and modify the status descriptions from any level. If your library uses the Polaris Web application, Leap, you can also define circulation status text to appear on a banner on the bottom of the book jacket image on the Item Record workform in Leap.

The Circulation Statuses table is set up during Polaris implementation, conversion, and site installation. All organizations in a Polaris installation must agree on the circulation statuses to use. You can view circulation status names, edit descriptions, and define banner text for Leap, but you cannot add or delete entries.

**Note:**

These System Administration permissions are required to view this table:

**Access administration: Allow, Access tables: Allow.**

Circulation statuses are displayed in the following locations in the Polaris staff client:

- In the **Circulation status** box on the Item Record workform
- As selections in the **For** and **Limit by** boxes on the Polaris Find Tool when you search for items
- In the PAC availability information for each item associated with a title, if you choose to display detailed item statuses (see the Public Access Administration PDF Guide, Set up the local/system item availability display ).

### Default Circulation Statuses

The default circulation statuses are:

- In - The item is on the shelf and available for circulation.
- Out - The item has been checked out and is in circulation.

- Out-ILL - Intended to be used in conjunction with a third-party ILL application, for example when using NCIP, to indicate the item has checked out to a remote library.
- Held - The item was requested by a patron while it was in circulation. When the item returned it was “trapped for hold” and set aside for the requestor. The item status is Held until the requestor retrieves the item for check-out.
- Transferred - The item was trapped for a hold for a patron from another library, and has been shipped to that library for pickup. The item will remain Transferred until received at the pickup library, where it will become Held. Transferred items may be said to be out-bound.
- In-Transit - In-transit items are items that have circulated at a remote branch and have been sent to the assigned branch. They may be said to be in-bound. When received at the Assigned branch and checked in, the item will become In.
- Lost - The item was checked out and the patron has informed the library that she lost the item. The staff member changes the status from Out to Lost using the Lost function in Patron Status. Or, the patron may be billed for the item if it has been long overdue, at which point the librarian may declare the item lost. The status will change to In if the item is recovered at circulation.
- Claim Returned - Polaris shows that an item is out, but the patron claims that the item was returned. The staff member used the Claim function in Patron Status to change the item circulation status from Out to Claim Returned. The status will change to In if the item is recovered at circulation.
- Claim Never Had - Polaris shows that an item is out, but the patron claims that she never had the item. The staff member used the Claim function in Patron Status to change the item circulation status from Out to Claim Never Had. The status will change to In if the item is recovered at circulation.
- Missing - An inventory status indicating that the item is not on the shelf as expected. Missing is distinguished from Lost in that Lost indicates that the item was in fact checked out and did not return. Missing indicates that, to the extent the library can determine, the item has not circulated but cannot be found.
- Withdrawn - The item has been removed from the circulating collection. It is not available for check-out or request.
- Bindery - The item has been removed from the collection temporarily and sent to the bindery.



- On-Order - The material has been ordered through Acquisitions and item records created in anticipation of receipt. The status can be assigned automatically at item creation within Acquisitions.
- In Repair - The item has been removed from the collection temporarily for repair.
- In Process - The item has recently been received and has not yet completed processing. The status can be assigned automatically at item creation within Acquisitions.
- Unavailable - A miscellaneous status used to indicate that the item is not available for circulation. No specific reason is associated with the status and there are no links to any program functions.
- Returned ILL - Intended to be used in conjunction with a third-party ILL application, for example when using NCIP, to indicate an item out to a remote branch has been returned by that branch.
- Routed - If a routed serial issue is linked to an item record, the item's circulation status is Routed. Attempts to check out a routed item produce an error message. Check the item in to change its circulation status from Routed to In, and then check it out.
- Shelving - A display status for items that are In but not yet returned to the shelf for circulation. The library defines how long the Shelving status is displayed for an item that is checked in.
- Non-Circulating - The item does not circulate; the Non-Circulating option is checked in the item record.
- Claim Missing Parts - When staff members use the Special Item Check-in dialog box to check in multi-part items for which a part or parts are missing, they can update the items to a status of Claim Missing Parts. This blocks the item from being circulated; moves the item to the Claims view of the Patron Status workflow; and generates a notice to the patron.
- EContent External Loan - Updates the eContent item record when a Polaris library loans an eContent title to a patron whose record is not in the Polaris database. The check-outs are from the vendor's application and the check-ins are from the patron view of the patron account or from the vendor's application. Only the APIs can apply the eContent external loan circulation status and only to integrated eContent items.

- Damaged - The item was declared damaged at check-in or from the Overdue/Out view of the patron record workflow in Leap.

**Note:**

You can only declare an item damaged when you are working in Leap. For more information, search for "Check In a Damaged Item" or "Declare an Item Lost or Damaged" in the Leap help.

See also: [View circulation status names, edit descriptions, and add Leap banner text](#)

### **View circulation status names, edit descriptions, and add Leap banner text**

Circulation statuses are defined at the System level and cannot be modified. However, if you have the required permissions, you can modify the description and/or the circulation status that appears at the bottom of the book jacket image on the Item Record workflow in Leap. For more information on the Item Record workflow in Leap, see the Leap help.

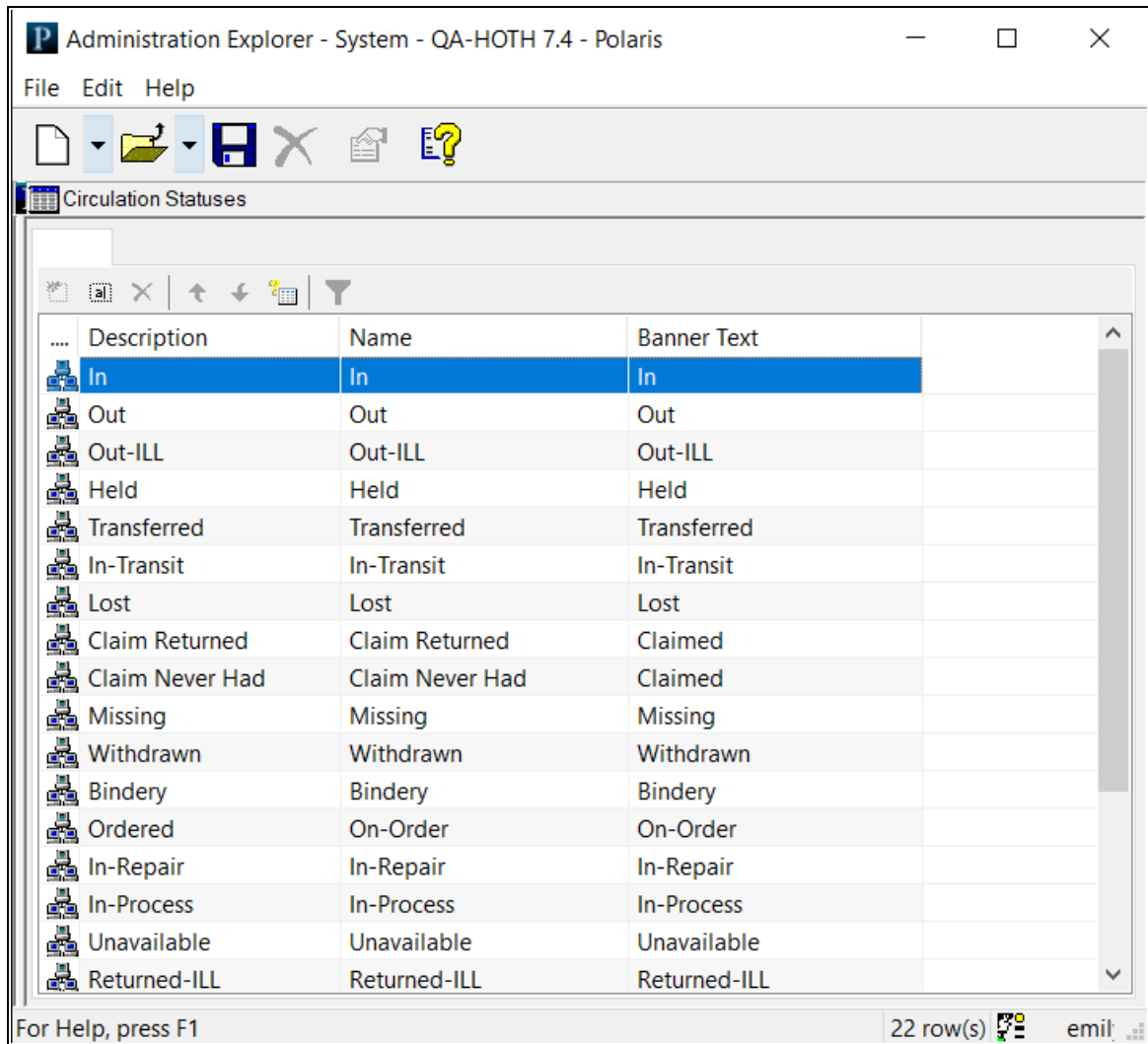
To view the standard names for item circulation statuses, edit descriptions, and add Leap Item Record workflow banner text:

**Note:**

You can modify the description for any circulation status, and you can use the same description for more than one status, but be cautious in applying the same description to multiple circulation statuses, since this may confuse both staff and patrons.

1. In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Circulation Statuses**.

The Circulation Statuses table is displayed in the details view.



2. Double-click the circulation status entry or click .

The Modify: Item Status dialog box appears.

Modify : Item Statuses - 10

Description:	Missing
Name:	Missing
Banner Text:	Missing

OK Cancel Help

3. Type the new description in the **Description** box. Modify the description so that it is understandable to everyone, including patrons. The modification affects only the description that is displayed; it remains associated with the underlying circulation status that appears in the **Name** box.

**Note:**

The non-circulating item status applies to those items where **Non-circulating** is checked in the item record. When you modify the description for this status, your description is displayed in the PAC for these items, but the description is not available as a Find Tool search filter or an option for bulk change. The actual status is **Non-circulating**.

4. If your library uses Leap and you want to display the circulation status on the bottom of the bookjacket image on the Item Record workform, type the text in the **Banner Text** box.

The example below shows the banner text in the Leap Item Record workform.

## Item Record i



**The wind in the willows**  
By *Grahame, Kenneth, 1859-1932.*

Barcode: **0000100304534**

Call number: **J Fict Gra**

Collection: **Children's Fiction**

Shelf location: **None**

Owning branch: **Lake Pleasant**

5. Click **OK**.

#### Related Information

- Shelving status - When an item is returned to its assigned branch and checked in, the item's circulation status becomes In even though the item may not be returned immediately to the shelf. For each material type, you can set a period of time during which the checked-in item's In status is displayed as Shelving (or another appropriate description). See [Setting Shelving Status](#).
- Non-circulating items - See [Setting Up Non-Circulating Items](#).
- Suppressing from PAC by circulation status - You can suppress items with specific circulation statuses from the PAC availability display. See the Public Access Administration PDF Guide, Suppressing Items from Search Results.
- Circulation statuses and how they occur - See [Default Circulation Statuses](#).

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## Setting Shelving Status

When an item is returned to its assigned branch and checked in, the item's circulation status becomes In even though the item may not be immediately returned to the shelf. This can be confusing for a patron who finds the item in PAC, notes that the item's status is In, but cannot find it on the shelf. To inform the patron that the item is not yet returned to the shelf, you can set a period of time for each material type during which the item's status is displayed as "Shelving" (or another appropriate description).

For the time period you set, patrons see the shelving status description for the item in the PAC. In the staff client, the shelving status description is displayed in Find Tool search results, the PAC preview in the bibliographic record, and the list of linked item records available from the bibliographic record or the item record. You can also limit Find Tool item searches by shelving status. For items checked in offline, when the offline transactions are uploaded, the shelving status display is calculated according to the date/time of the check-in recorded in the upload file.

When you enable the shelving status option, the shelving description is displayed only when an item is checked in during a circulation process and its circulation status changes to In. The option is not used when an item is created with a status of In or when the status of multiple items is changed to In through bulk change.

### Note:

If you use Polaris Serials, part of your serials processing workflow may be to create items with a status of In when a serial issue is checked in. To use the shelving status description with these items, set the status to **In Process** or another status other than In, then check in the item as a circulation process—using **Circulation > Check In** or selecting **Tools > Check In** from the item record workflow.

Use the Patron Services parameter **Shelving status options** to enable this option and to control how long the system displays the shelving status description for each material type. You can set the shelving status period at the system, library, or branch level, but you can only set the shelving status description text at the system level so that the description is consistent in PAC search results. When an item is checked in, the system uses the shelving status settings for the transacting branch.

**Note:**

- For more information about how Polaris calculates and applies the shelving status period, see [Understanding the Shelving Status Period](#).
- If you have the shelving status option activated for a branch, then turn it off, the status of items currently in Shelving change to In. This change can take up to 10 minutes.

See also:

- [Set Shelving Status Options](#)
- [Understanding the Shelving Status Period](#)

## Set Shelving Status Options

**Note:**

For more information about how Polaris calculates the shelving status period and then applies and removes the shelving status, see [Understanding the Shelving Status Period](#).

### To set shelving status options

1. In the Administration Explorer tree view, open the Parameters folder for the organization, and select the Patron Services tabbed page in the details view.
2. Double-click **Shelving status options** to display the Shelving Status Options dialog box.
3. Select **Enable shelving status**. The other options become available.

Shelving Status Options [COB] (inherited from [QA-Polaris])

Enable shelving status

Display text:

Time to display

Time:

Material Type	Time To Display (HH:MM)
Art	00:00
Audiobook	10:00
Book	10:00
Book and CD	00:00
Children's Video	30:00
eBook	00:00
Equipment	00:00

If an item is re-scanned...

Clock is reset and the shelving status will expire at the new time

Shelving status will expire at the time already set

Circulation status will display as In

4. (System level only) Specify the status text to display for an item in the PAC and the staff client Find Tool when an item is checked in and the status changes to "In". The default text is "Shelving". Use this text or specify any description that will make sense to your patrons, such as "Sorting" or "Recent Return".
5. Select the material type or types for which you want to set the time period.
6. In the **Time** boxes, specify the shelving status period for the selected material type (s). Select **hours** or **minutes**, and type or select the number of hours or minutes.
7. Select **Set Time**.

The number of hours or minutes you specified is listed for the selected material type or types.

8. Select an option to specify what should happen when an item is checked in, the status changes to "In", and the item is checked in again (circulation status goes from "In" to "In" before the shelving status time period has expired):
  - **Clock is reset** - The specified time period to display the shelving status description starts again, as if the item were being checked in the first time.



- **Shelving status will expire at the time already set** - The clock is not reset. The shelving status description will expire at the end of the original period.
  - **Circulation status will display as In** - The shelving status description will no longer be displayed. In the PAC and staff client Find Tool, the circulation status will be displayed as "In".
9. Select **OK** to save your settings.

## Understanding the Shelving Status Period

The following sections explain how Polaris calculates the shelving status period and then applies and removes the shelving status after an item is checked in:

- [Shelving Status Period and Library Open Hours](#)
- [How Polaris Changes the Shelving](#)

### Shelving Status Period and Library Open Hours

The shelving status period is calculated based on the hours the library is open. For example, if the shelving status period is set to 48 hours, the shelving status remains in effect for 48 open hours after the item is checked in (not 48 continuous hours). Set the shelving period based solely on the average time it takes to shelve items; program calculations will take into account the library's schedule.

The program takes into account days closed (hours of operation) and dates closed. For proper calculation, be sure hours of operation are set up for your branch. See the Polaris Administration Guide, "Registering a Branch."

The shelving status period is recalculated when items are checked in close to the library's closing time:

- If the period is less than 24 hours, and the item is checked in less than three hours before closing time, the shelving status expiration time is recalculated.

**Example:**

The shelving status period is six hours. The item is checked in one hour before the library closes. The shelving status period begins at opening time on the next open day and lasts for six hours.

- If the period is less than 24 hours, and the item is checked in three hours or more before closing time, the shelving status expiration time is not recalculated.

**Example:**

The shelving status period is six hours. The item is checked in five hours before the library closes. The shelving status period is applied using the five hours today and one hour tomorrow.

## How Polaris Changes the Shelving Status

This section describes how and when Polaris changes the "Shelving" status to the "In" status. There are two components that control this process:

- an SQL Job
- a stored procedure

This process does the following:

1. The [Item Shelving Status SQL Job](#) runs at a predefined interval and starts the Circ\_MaintainItemShelvingStatus stored procedure. By default, this interval is every nine minutes from 7:30 A.M to 9:00 P.M, daily.
2. The Circ\_MaintainItemShelvingStatus stored procedure checks when it last reviewed item statuses. If the correct time interval has elapsed, the procedure continues to the next step. Otherwise, it stops without reviewing item statuses.

To determine the correct time interval, the procedure:

- a. Uses the settings configured on the [Shelving Status Options](#) dialog box.
- b. Finds the shortest shelving period configured for any branch or material type.
- c. Reviews items at an interval that is *half* as long.

For example, if the shortest shelving period is eight hours, the Circ\_MaintainItemShelvingStatus stored procedure reviews items every four hours.

3. The procedure searches for items with a status of "Shelving" and processes them as follows:
  - a. Determines the material type of the item and finds the corresponding value for that material type in the [Shelving Status Options](#) dialog box.
  - b. Determines if the end of the shelving duration has been reached using the value from the step above and the library's open hours (see [Shelving Status Period and Library Open Hours](#) above).
  - c. If the end of the shelving duration has been reached, the procedure updates the item's status to "In".

### Notes:

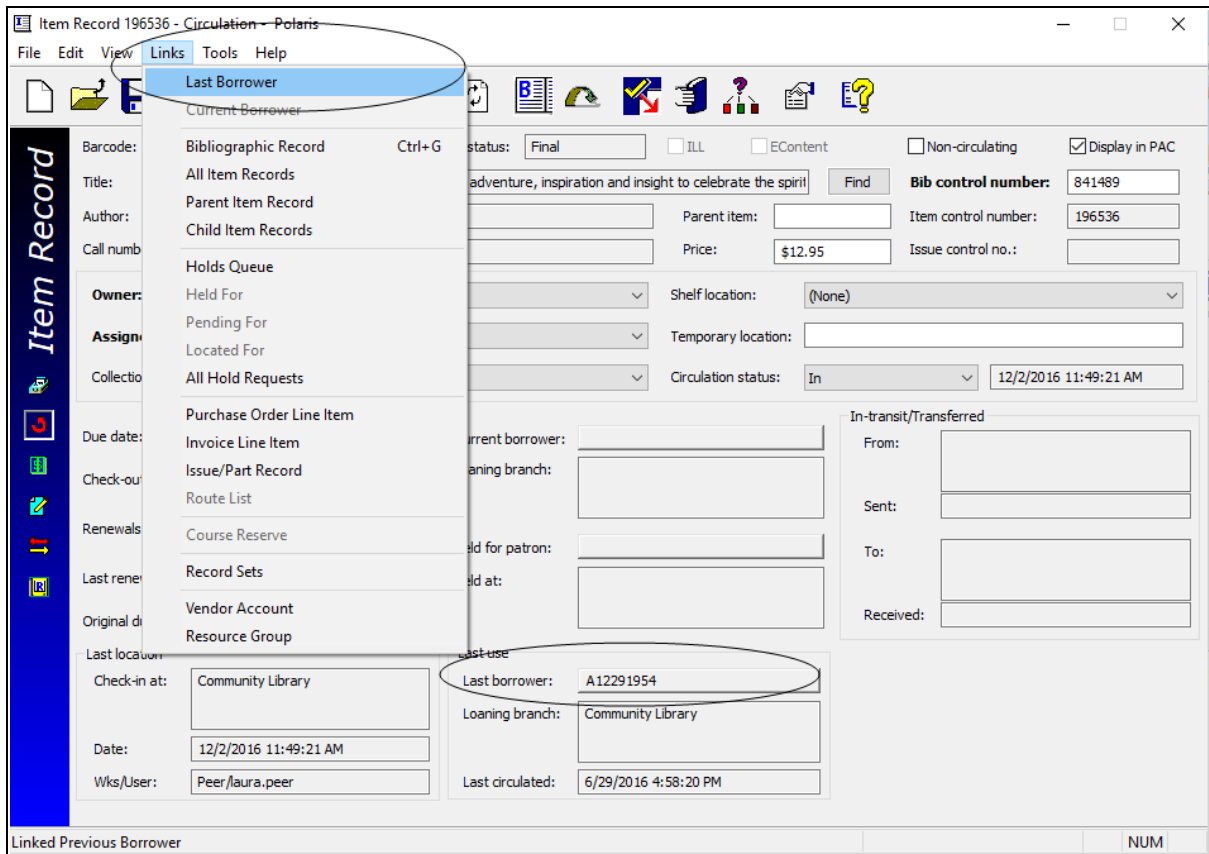
- Because the Circ\_MaintainItemShelvingStatus procedure runs at defined intervals, an item's status could change from "Shelving" to "In" at a time that does not match the shelving status period to the minute.
- Running the Circ\_MaintainItemShelvingStatus procedure uses system resources. Be sure to set realistic shelving status periods – 12 hours rather than 12 minutes – when you configure shelving status options. Setting periods less than nine minutes can adversely affect circulation workflows.

For more information about the Item Shelving Status SQL job, see the *Administration Guide*, "Polaris SQL Jobs Reference."

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## Displaying an Item's Last Borrower

Use the Patron Services parameter **Last use patron display** to enable a link from the item record to the Patron Status workform for the item's last borrower, or to suppress the link. This parameter also controls whether the patron's barcode is displayed in the Item Record workform. This parameter can be set on the system, library, or branch level. The setting for the log-on branch controls whether the link is available.



To enable the previous borrower link in item records as displayed for the staff member's log-on branch:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Last use patron display**, and select **Yes**.
3. Select **File > Save**.

You can limit the number of days that the last borrower's information is kept in the item record. In the Administration Explorer tree view, select **Parameters > Patron Services**:

- **Last use patron: Delete:** Determines if the last borrower's information is kept in item records. The default value is **Yes**.
- **Last use patron: Number of days to keep:** Sets the number of days the last borrower's information is kept. The default value is **0**.

## Automatic Process for Lost, Missing, Withdrawn Items

Libraries can set the patron services parameters, **Lost item transition** and **Missing item transition**, to automatically update the circulation status of lost or missing items based on a specified period of time. When the Lost item transition or Missing item transition processing has been enabled, the Lost Missing Withdrawn Processing SQL job identifies items that meet the criteria specified in the applicable parameter and updates the items as follows:

- Lost items transition to either Missing or Withdrawn
- Missing items transition to Withdrawn

### Note:

The first time the job runs, processing may take some time because all the item records that have retained a Lost status for longer than specified in the Lost item transition parameter, and all the items that have retained a Missing status for longer than specified in the Missing item transition parameter are included in the processing. When determining if a particular item should be updated automatically, the day on which the job is run is not included.

See also:

- [Setting Public Access Profiles and Parameters](#)
- [Setting Public Access Profiles and Parameters](#)

---

### Set up lost item transition to missing or withdrawn

#### Note:

Libraries in a consortium will need to consider whether to implement the automatic transition of Lost items because the items will be assigned the new status without regard to Lost item recovery settings for the Governing library.

To enable lost item transition processing:

1. In Polaris Administration, select the library organization (system, library, or branch), **Parameters, Patron Services**. To see the patron services parameters list, click the appropriate level- System, Library, Branch.
2. Select **Lost item transition** in the list of parameters.

The Lost item transition dialog box opens. The **Do not change status** option is selected by default.

3. Select **Missing** or **Withdrawn**.
4. Specify the time period after which Lost items will be updated to either Missing or Withdrawn by selecting a number and Months or Years.

**Recommendation:**

The transition period set by the Assigned Branch should be longer than any of the lost-and-paid recovery periods set within the library system. This reduces the likelihood of an item being recovered after it has received a Withdrawn status.

5. If you want to charge accruing overdues to the patron's account, select **Charge accruing overdues**.
6. Select **OK**.

### Lost item transition processing

When an item transitions from Lost, the following updates are made to the item record:

- The circulation status changes from Lost to Missing or Withdrawn.
- The status reflects the date and time of the change.
- The item is removed from the Patron Status workform, Claims view.
- If the item is lost and not paid, the charge remains on the patron's account.
- If the item is lost and paid, no lost-item-recovery options, such as crediting the patron's account, are applied.
- If Charge accruing overdues is selected, the charges are added to the patron account.
- The item record history displays: Circulation status modified via Lost Item Transition processing Automatic status change.

---

### Set up missing item transition to withdrawn

To enable missing item transition processing:

1. In Polaris Administration, select the library organization (system, library, or branch), **Parameters, Patron Services**. To see the patron services parameters list, click the appropriate level- System, Library, Branch.
2. Select **Missing item transition** in the list of parameters.
3. The Missing item transition dialog box opens.
4. Select **Move missing items to withdrawn**.
5. Specify the time period after which Missing items will be updated to Withdrawn by selecting a number and Months or Years.
6. Select **OK**.

### **Missing item transition processing**

When an item transitions from Missing to Withdrawn, the following updates are made to the item record:

- The circulation status changes from Missing or Withdrawn.
- The status reflects the date and time of the change.
- The item record history displays: Circulation status modified via Missing Item Transition processing Automatic status change.
- Other item data, including the last borrower, remain.



## Automatic Processes During Import

When records are imported, they are processed according to settings in the import profile and in Polaris Administration. Some processing takes place before any records are created or updated, and other processing occurs when the data in the imported records are used to create or update records. This section covers the automatic processing you can choose to initiate in the import profile settings.

This topic contains the following sections:

- [MARC Records Validated](#)
- [Authority Control Performed](#)
- [Records Checked for Duplicates](#)
- [Specific MARC Tags Removed from Incoming Bibs](#)
- [Incoming Bibs Protected from Being Overlaid](#)
- [Bib Tags Marked to Prevent Creation/Updates of Items](#)
- [Authority Records Deleted](#)
- [Item Records Created from Embedded Holdings Tags](#)
- [Duplicate Records Overlaid](#)
- [Tags Retained from Duplicate Records](#)
- [Bibliographic Overlay Based on Encoding Level](#)
- [Specific MARC Tags Removed from Incoming Bibs](#)
- [Authority Record Overlay Based on Cataloging Source](#)

---

### MARC Records Validated

If validation is selected in the import profile, the records are validated according to the following Polaris Administration Cataloging profiles: **MARC validation: Bibliographic** and **MARC validation: Authority**. However, if the incoming records contain indicators or subfields with data that cannot be validated, the data is replaced with the following defaults: Indicators default to ' ' and subfields default to '?'. For more information, see the Cataloging Administration PDF Guide, Administering MARC Validation and Display.

## Authority Control Performed

If the options to **Perform authority control** and **Automatically create new authority record; save bibliographic record as final** are selected in the Bibliographic Records tab of the import profile, the system searches for an existing authority record for the heading. If no matching authority record is found in the local database, an authority record is created automatically and saved to the database. If your library has a subscription to a remote database of authority records, the remote database is automatically searched when no matching authority record is found. The new authority record is saved in the database and linked to the new bibliographic records. Search Polaris help for "Set import options for authority records."

---

## Records Checked for Duplicates

If duplicate detection is selected in the profile, duplicates are identified according to the rules in the following Polaris Administration database tables: **Bibliographic Deduplicaton** or **Authority Deduplication**. For more information, see the *Cataloging Administration Guide*, "Change bibliographic or authority deduplication tables." You can also select the option **Use profile defined duplicate detection rules** in the import profile and select the rules to apply.

---

## Specific MARC Tags Removed from Incoming Bibs

If the import profile is set up to automatically remove tags from incoming bibliographic records, the tags are removed from the records before they are saved in the Polaris database. Search Polaris help for "Set import options for bibliographic records."

---

## Incoming Bibs Protected from Being Overlaid

If the import profile is set up to check the **Do not overlay** box on the incoming records, they are saved as protected records that cannot be overlaid. Search Polaris help for "Set import options for bibliographic records."

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## Bib Tags Marked to Prevent Creation/Updates of Items

If you are using an import profile that is set to create item records from embedded holdings tags, an automatic process first checks the bibliographic records for the presence of pre-existing holdings tags with the same tag number specified in the import profile. If pre-existing tags are found that match the retained tags under **Keep MARC tags** in the import profile, and these tags do not already have a \$9 subfield, then a system-supplied \$9 with the text **Tag retained from duplicate overlay** is inserted into the tag. Pre-existing embedded holdings tags that do not already have a \$9 subfield are marked automatically without a Polaris Administration parameter.

When embedded holdings tags are used to create new items or to update on-order items to shelf-ready items, a \$9 with the text **Item generated** is inserted into the tag if the Polaris Administration Cataloging parameter **MARC embedded holdings tags as processed** is set to **Yes**. During the import process, item records are not created or updated if the embedded holdings tags are marked as follows:

- **\$9 Tag retained from duplicate overlaymmm dd yyyy hh:mm[AM/PM]**

Or

- **\$9 Item generated mmm dd yyyy hh:mm[AM/PM]**

Your Polaris Administrator can use a utility to automatically scan for specific tags marked with \$9 and remove them. See the Cataloging Administration PDF Guide, Setting Utility to Delete Bib Tags Marked with Subfield 9.

---

## Authority Records Deleted

If the incoming authority record status (Leader/05) is **d**, **s**, or **x**, the following deletion processing occurs during import:

- If the incoming authority record status is **d** (deleted), the following processing occurs:
- All bibliographic record links to and from the existing authority record are disconnected.
- If any authority record has the existing authority record 1xx field as a 4xx field, the cross-reference is logged in the import report.
- All authority record links to the existing authority record are disconnected.

- The existing authority record is replaced by the incoming record.
- The deleted record is logged in the import report.
- If the incoming authority record status (Leader/05) is **s** (deleted; heading split into two or more headings), the following processing occurs:
  - All bibliographic and authority record links to and from the existing authority record are disconnected.
  - All disconnected links are logged in the import report.
  - The existing authority record is replaced by the incoming record.
  - The deleted record is logged in the import report.
- If the incoming authority record status (Leader/05) is **x** (deleted; heading replaced by another heading), the following processing occurs:
  - All bibliographic and authority record links to and from the existing authority record are disconnected.
  - The existing authority record is replaced by the incoming record.
  - The deleted record is logged in the import report.

---

## Item Records Created from Embedded Holdings Tags

When you import bibliographic records using an import profile that is set to build item records from embedded holdings tags, the items are created automatically based on the holdings tag number and MARC subfield mapping specified on the Item Records tab. This table shows the default settings, requirements, and data entry conventions for item record creation from data in the 852 tag in the **Polaris default (with item creation)** profile. The data entry conventions apply to all profiles.

Polaris Item Record Field	Subfield	Required	Data Entry Conventions
Assigned (branch)	\$a	Yes	Must match a branch ID or abbreviation. 15 characters max.
Collection	\$b	No	Must match a collection ID or abbreviation. 15 characters max.

Polaris Item Record Field	Subfield	Required	Data Entry Conventions
Barcode	\$p	No	20 characters max.
Call Number Prefix	\$k	No	60 characters max.
Call Number Suffix	\$m	No	60 characters max.
Circ Status	N/A	No	ID or description. 80 characters max. Certain circ statuses are not allowed in new item records, for example <b>Lost</b> . If the ID or description in the circ status is not allowed, the circ status is taken from the template or from system defaults for item records.
Classification Number	\$h	No	60 characters max.
Copy Number	\$t	No	60 characters max.
Cutter Number	\$i	No	60 characters max.
Display in PAC	\$4	Yes	0 = No, 1 = Yes
Fine code	\$r	Yes	FineCodeID (ID or description). 80 characters max.
Free Text Block	N/A	No	255 characters max.
Funding Source	\$1	No	50 characters max.
Holdable	\$5	Yes	0 = No, 1 = Yes

<b>Polaris Item Record Field</b>	<b>Subfield</b>	<b>Required</b>	<b>Data Entry Conventions</b>
Library Assigned Block	N/A	No	ID or description. 80 characters max.
Loan Period Code	\$u	Yes	LoanPeriodCodeID, ID, or description. 80 characters max.
Loanable Outside System	\$7	Yes	0 = No, 1 = Yes
Material Type	\$w	Yes	MaterialTypeID, ID, or description. 80 characters max.
Name of Piece	N/A	No	255 characters max.
Non Circulating	N/A	No	0=No, 1=Yes
Non-Public Note	\$x	No	255 characters max.
Owner (branch)	\$o	Yes	Must match a branch ID or abbreviation. 15 characters max.
Physical Condition	\$q	No	255 characters max.
POLI-Segment ID	N/A	No	Number
Price	\$0	No	Monetary value (Format: ##.## No '\$' should be in the subfield. Include a decimal where appropriate.)
Public Note	\$z	No	255 characters max.
Renewal Limit	\$y	Yes	0-99
Shelf Location	\$c	No	Must match shelf

Polaris Item Record Field	Subfield	Required	Data Entry Conventions
			location ID or description. 80 characters max.
Shelving Scheme	\$j	Yes	0=No information, 2=Library of Congress 3=Dewey Decimal 4=National Library of Medicine 5=Superintendent of Documents 6=Shelving Control Number 7=Title 8=Shelved Separately 9=Other
Statistical Code	\$d	No	ID or description. 80 characters max
Temporary Shelf Location	\$l	No	25 characters
Vol (volume)	\$v	No	60 characters max.

### Duplicate Records Overlaid

If the import profile is set to perform duplicate detection, it can also specify how duplicate records are handled. For information regarding the process that compares the encoding level of duplicate bibliographic records, see [Bibliographic Overlay Based on Encoding Level](#). For information regarding the process that compares the cataloging

source of duplicate authority records, see [Authority Record Overlay Based on Cataloging Source](#).

---

## Tags Retained from Duplicate Records

The Bibliographic Tags to Retain/Delete policy table is used to identify tags in bibliographic records to retain from duplicate records that are overlaid. The Authority Overlay Retention policy table is used to identify tags in authority records to retain from duplicate records that are overlaid.

**Note:**

The Bibliographic Tags to Retain/Delete policy table can also be used to identify tags to delete from incoming records whether they are duplicates or not.

For more information on these tables, see the *Cataloging Administration Guide*, "Specify Tags to Retain from Overlaid Bibs" and "Specify Tags to Retain from Overlaid Authority Records."

For bibliographic records, you can also select the option **Profile-defined overlay retention tags** in the import profile and select additional bibliographic tags to retain. See [Set import options for bibliographic records](#).

---

## Bibliographic Overlay Based on Encoding Level

If the import profile is set to compare the encoding levels of duplicate records, the value in Leader position 17 is checked.

**Note:**

Double-click on the Leader in the MARC21 view of the Bibliographic Record workform to see the encoding levels in Leader position 17:

- space - Full level
- 1 - Full level, material not examined
- 2 - Less than full level, material not examined
- 3 - Abbreviated level
- 4 - Core level
- 5 - Partial (preliminary) level



7 - Minimal level  
8 - Prepublication level  
E - System-identified MARC error in batchloaded record  
I - Full-level input by OCLC participants  
J - Deleted record  
K - Less-than-full input by OCLC participants  
L - Full-level input added from a batch process  
M - Less-than-full added from a batch process  
u - Unknown  
z - Not applicable

The following table shows the values in the incoming record in Leader position 17 and the values in the existing record that allow or disallow an overlay. If the encoding levels are equal, the records are processed according to the setting in the import profile.

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
space	space	J
	1	
	2	
	3	
	4	
	5	
	7	
	8	
	u	
	z	
	E	
	I	
	K	
	L	
M		
<b>Incoming LDR/17 Value</b>	<b>Can Overlay</b>	<b>Cannot Overlay</b>

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
1	1	space
	2	I
	3	L
	4	J
	5	
	7	
	8	
	u	
	z	
	E	
	K	
	M	
Incoming LDR/17 Value	Can Overlay	
2	2	space
	3	1
	4	7
	5	I
	8	L
	u	J
	z	
	E	
	K	
	M	

Incoming LDR/17 Value	Can Overlay	Cannot Overlay	
<b>Incoming LDR/17 Value</b>	<b>Can Overlay</b>	<b>Cannot Overlay</b>	
3	3	space	
	5	1	
	8	2	
	u	4	
	z	7	
	E		I
			J
			K
			L
			M
<b>Incoming LDR/17 Value</b>	<b>Can Overlay</b>	<b>Cannot Overlay</b>	
4	3	space	
	4	1	
	5	7	
	8	I	
	u	J	
	z	K	
	E		L
			M
<b>Incoming LDR/17 Value</b>	<b>Can Overlay</b>	<b>Cannot Overlay</b>	

Incoming LDR/17 Value	Can Overlay	Cannot Overlay	
5	5	space	
	u	1	
	z	2	
	E		3
			4
			7
			8
			I
			J
			K
			L
			M
Incoming LDR/17 Value	Can Overlay	Cannot Overlay	

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
7	2	space
	3	1
	4	I
	5	J
	7	L
	8	
	u	
	z	
	E	
	K	
	M	
Incoming LDR/17 Value	Can Overlay	Cannot Overlay
8	5	space
	8	1
	u	2
	z	3
	E	4
		7
		I
		J
		K
		L
		M

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
u	u	space
	z	1
	E	2
		3
		4
		5
		7
		8
		I
		J
		K
		L
		M
	Incoming LDR/17 Value	Can Overlay

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
z	u	u
	z	space
	E	1
		2
		3
		4
		5
		7
		8
		I
		J
		K
		L
		M
Incoming LDR/17 Value	Can Overlay	Cannot Overlay



Incoming LDR/17 Value	Can Overlay	Cannot Overlay
E	E	u
		z
		space
		1
		2
		3
		4
		5
		7
		8
		I
		J
		K
		L
M		
Incoming LDR/17 Value	Can Overlay	Cannot Overlay

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
I	space	J
	1	
	2	
	3	
	4	
	5	
	7	
	8	
	u	
	z	
	E	
	I	
	K	
	L	
M		
<b>Incoming LDR/17 Value</b>	<b>Can Overlay</b>	<b>Cannot Overlay</b>

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
J		space
		1
		2
		3
		4
		5
		7
		8
		1
		u
		z
		E
		I
		J
		K
		L
M		
Incoming LDR/17 Value	Can Overlay	Cannot Overlay

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
K	2	space
	3	1
	4	7
	5	I
	8	J
	u	L
	z	
	E	
	K	
	M	
Incoming LDR/17 Value	Can Overlay	Cannot Overlay

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
L	space	J
	1	
	2	
	3	
	4	
	5	
	7	
	8	
	u	
	z	
	E	
	I	
	K	
	L	
M		
<b>Incoming LDR/17 Value</b>	<b>Can Overlay</b>	<b>Cannot Overlay</b>

Incoming LDR/17 Value	Can Overlay	Cannot Overlay
M	2	space
	3	1
	4	7
	5	I
	8	J
	u	L
	z	
	E	
	K	
	M	

### Authority Record Overlay Based on Cataloging Source

If the option **Merge duplicate records** is selected when importing authority records, the 040 \$a of the incoming record is checked against the entries in the following Administration policy table: **Authority Record Import: Preferred Cataloging Source**. If the (040 \$a) code in the incoming record matches an entry in the table, the preference order of the code is checked. The incoming record overlays the database record if it has a higher level of preference than the code in the database record.

**Note:**

For information on setting up this policy table, see the *Cataloging Administration Guide*, "Specify preferred cataloging sources for authority records."

1. The original cataloging agency of the incoming record (tag 040 \$a) is matched to entries in the Authority Record Import: Preferred Cataloging Source policy table in Polaris Administration.

Preferred Cataloging Source Table Entries for Importing Library	Incoming Record Tag 040 \$a	Import Processing Status
Has entries	Matches a table entry	Valid for import processing
Has entries	Does not match a table entry	Invalid record is logged in the import report, but is not added to the catalog
Has entries	No tag 040	Invalid record is logged in the import report, but is not added to the catalog
No entries	No tag 040	Incoming record is added to catalog as provisional. Logged in import report. Added to provisional record set if specified. Existing record is not changed.
No entries	Has original cataloging source information	Valid for import processing

2. If the imported authority record is from a preferred cataloging agency, the ranking of the agency is compared with the agency ranking of the existing record.

The ranking of preferred cataloging agencies is determined by the agency’s entry position in the Authority Record Import: Preferred Cataloging Source policy table in Polaris Administration.

Incoming Record Original Cataloging Agency Preference	Processing Done for Incoming Record
<b>Higher</b> than the agency for the existing record	Processed according to value in record status (Leader/05)

Incoming Record Original Cataloging Agency Preference	Processing Done for Incoming Record
<b>Equal to</b> the agency for the existing record	Processed according to value in record status (Leader/05)
Existing record does not have a cataloging agency specified	Processed according to value in record status (Leader/05)
<b>Lower</b> than the agency for the existing record	Entry logged in import report. Incoming record is not added to catalog.

3. If the imported record has a higher or equal source preference than the existing record, the duplicate records are processed based on the record status (Leader/05) of the incoming record.
  - If the incoming record has a record status of **n** (new), **c** (corrected or revised), or **a** (increase in encoding level), Polaris does new or update processing.
  - If the incoming record has a record status of **d** (deleted), **s** (deleted with heading split), or **x** (deleted with heading replaced), Polaris does deletion processing.



## Enable the auto-renew process

To enable automatic renewal of items:

1. In Polaris Administration, select the library organization (system, library, or branch), **Parameters, Patron Services**.
2. Select **Renewal: Auto-renew**, and select **Yes**.

Automatic renewals are completed as part of the Notices Processing SQL job. When the job runs, it automatically renews eligible items for which the item's assigned branch has the **Renewal: Auto-renew** parameter set to **Yes**. A patron's items will be auto-renewed based on the number of days specified in the **Notice options, Reminders** setting for the patron's registered branch.

See also: [Setting Public Access Profiles and Parameters](#)

## Governing Library for Circulation Transactions

The system-level Patron Services parameter **Consortium Circulation** establishes which library's settings govern certain aspects of check-out and renewal transactions: the patron's branch, the transacting branch, or the item's assigned branch. An additional setting for lost item recovery governs which library's settings determine how charges are processed when a lost item is recovered at check in. The governing library settings are particularly useful for setting uniform processing rules in consortia whose members may have widely differing individual policies.

You can set the governing library for due date calculation, loan and request limits, fine calculation, and lost item recovery.

The following transactions are affected:

- Due date calculation - Check-out and renewal from the staff client; renewal from PAC; check-out and renewal from Polaris ExpressCheck; renewal by telephone (Polaris Phone Attendant). A renewal uses the settings for the governing library of the check-out transaction.
- Loan and request limits - Check-out and renewal from the staff client, including renewal from the patron account; renewal from PAC; check-out and renewal from Polaris ExpressCheck; renewal by telephone (Polaris Phone Attendant); offline upload. A renewal uses the settings for the governing library of the check-out transaction.
- Fine calculations - Check-out and renewal from the staff client, including renewal from the patron account; renewal from PAC; check-out and renewal from Polaris ExpressCheck; renewal by telephone (Polaris Phone Attendant); offline upload; check in from the item record; lost item charge options. A renewal uses the settings for the governing library of the check-out transaction.
- Lost item recovery - Check-in transactions from the Check In workform (Normal and Bulk modes), the Item Record workform, the Find Tool results list, and the Patron Status workform. For offline check in, the settings are checked and the appropriate charges are calculated when the offline transactions are uploaded.

Governing library settings do not affect reserve item records, which always circulate according to the reserve item's assigned branch, or offline check-out and renewal.

See: [Set the governing library for circ transactions.](#)

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## Set the governing library for circ transactions

**Note:**

The parameters for the governing library are at the System level only.

To set the governing library for circulation transactions:

**Important:**

Your settings for this parameter apply to all organizations.

1. In the Administration Explorer tree view, open the **Parameters** folder for the system, and click the **Patron Services** tab to display the Patron Services parameters in the details view.
2. Double-click **Consortium Circulation**.

The Consortium circulation dialog box appears.

3. In the Due date calculation box, select one of the following options to specify the governing library for due date calculation:
  - **Use item assigned branch** (default)
  - **Use patron branch**
  - **Use transacting branch**

The due date calculation selection specifies which branch's settings in the Loan Periods policy table and the Patron Services parameter **End-of-term due date options** are used when the due date is calculated at circulation. Exceptions:

- At circulation, an end-of-term due date setting overrides a special loan period if the governing library is the item’s assigned branch or the patron’s branch. But if the governing library is the transacting branch, the special loan period overrides the end-of-term due date setting.
  - The system always uses the **Hours of operation** (closed days) parameter settings and Dates Closed policy table of the transacting branch when calculating the due date.
  - The system checks the governing library’s Loan Periods policy table to determine if an item is an hourly loan. If so, the system then uses the **Hours of operation** and **Overnight loan period** parameter settings of the transacting branch.
  - The Patron Services parameters **Overdues: Clear fine if recovered at check-out** and **Overdues: Clear fine if recovered at renewal** are set at the system level, so the same settings for these parameters apply to all organizations in the system.
4. In the Patron blocks box, select one of the following options to specify the governing library for patron blocks (loan and request limits):
- **Use patron branch** (default)
  - **Use transacting branch**

This selection specifies which branch’s settings in the Patron/Material Type Loan Limit Blocks policy table are used at check-out and renewal. This table also limits the total numbers of hold and ILL requests, and the number of hold requests allowed for specific material types. For these request limits, the “transacting branch” is the pick-up branch for the request.

Exceptions:

- This setting affects only the Patron/Material Type Loan Limit Blocks policy table. It does not affect any other types of blocks, such as free-text blocks, library-assigned blocks, collection agency blocks, verify borrower blocks, patron record expiration blocks, or address check blocks.
  - This setting does not affect the block on an item designated as non-circulating.
5. In the Fine calculation box, select one of the following options to specify the governing library for fine calculation:
- **Use item assigned branch** (default)
  - **Use patron branch**

- **Use transacting branch (usually the check-in branch)**
- **Use lending branch**

The fine calculation selection specifies which branch's settings in the following Polaris Administration controls are used when a fine is calculated at circulation: Fines policy table, including grace units; Dates Closed policy table; the Patron Services parameter **Days not fineable**; the Patron services parameter **Lost item charge options**.

Exception: This setting does not affect the Patron Services parameter **Free days**. The system always uses the **Free days** setting of the transacting branch.

6. In the **Lost item recovery** box, select one of the following options to specify the governing library for lost item recovery:
  - Use transacting branch (default - usually the check-in branch)
  - Use lending branch

The lost item recovery selection specifies which branch's settings in the Patron Services parameter **Lost item recovery** are used when a lost item is recovered at check-in.

7. Click **OK** on the dialog box.
8. Select **File > Save**.

#### Related Information

- Loan and request limit blocks - See [Defining Loan and Request Limit Blocks](#).
- Overdue fines - See [Setting Fine Amounts](#).
- Lost item charge processing and recovery - See [Overdue Fines on Lost Items](#) and [Setting Lost Item Recovery Defaults](#).

## Defining Loan Periods

Due date calculation is based on settings in both the patron record and item record, as well as the policies and schedule of the lending library. Polaris Administration tables define patron codes and item loan period codes, and determine the relationships between them. At check-out, the system links the item and patron records and determines which settings to use when calculating the due date.

Patron codes and item loan period codes are shared by all libraries to facilitate lending and receiving items anywhere in the system. However, each branch in the system can establish different policies concerning loan durations for specific patron and item code combinations.

### **Important:**

You set which branch's policies are used in due date calculation with the system-level Patron Services parameter **Consortium Circulation**. See: the Public Access Administration Guide, Governing Library for Circulation Transactions topic.

The settings used to calculate due dates are established when Polaris is first installed, but you can change them when a library or branch is added to the system, or when lending policies change. After you set up the criteria that affect due dates, you can set up fines for overdue items. See [Defining Fines and Fees](#).

See also:

- [Calculating Due Dates](#)
- [Defining Loan Period Codes](#)
- [Defining Loan Period Durations](#)
- [Setting End-of-Term Due Dates](#)

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## Calculating Due Dates

When a patron checks out or renews an item, the due date is calculated based on the following:

- The patron code and item loan period relationship established by the governing library for the transaction (by default the item's assigned branch), and
- The closed dates and hours of operation of the lending library.

The patron code is stored in the patron record, while the loan period code is stored in the item record. The Loan Periods policy table associates the patron code and loan period code to determine the loan period for an item assigned to a particular branch.

All daily and weekly loans are due at 11:59 PM on the due date. For information on items with a loan period set in hours or minutes, see [Hourly Loans](#).

**Note:**

For daily and weekly loans, overdue fine calculation does not begin until the end of the day. For hourly loans, fines are calculated according to the exact time due. See [Calculating Overdue Fines](#).

The following factors affect how Polaris calculates due dates:

- [Undefined and Standard Loan Periods](#)
- [Closed Dates and Days](#)
- [Hourly Loans](#)
- [Non-Circulating Items](#)
- [Renewal Parameter Settings](#)

### Undefined and Standard Loan Periods

If a relationship between the patron code and loan period code cannot be found in the Loan Periods policy table, Polaris uses the setting in the Patron Services parameter **Undefined loan period**, which is set at the system level. The default value is 14 days. This value is also used to automatically add an entry to the table if a new branch or patron code is added.

**Note:**

If a loan period cannot be found in any table or parameter, a message at check-out indicates that the loan period cannot be calculated. In this case, circulation staff can allow the system to use the undefined loan period setting, or they can set the item's loan period manually, by opening the Special Loan dialog from the Check Out workflow.

For offline circulation, the system always uses the workstation branch's setting for the Patron Services parameter **Standard loan period** to calculate the due date. This is

because there is no access to the database during offline circulation. However, the Loaning Branch recorded in the transaction and in the item record is the logged-on user's branch. This allows libraries to gather statistics for different bookmobile stops based on user log-on, while maintaining a consistent loan period for the bookmobile (the workstation branch).

### Closed Dates and Days

The lending library's closed dates and closed days are used in the due date calculation. If the due date is defined as closed in the Dates Closed policy table (for example, January 1), the due date moves to the next open date. See the Polaris Administration Guide, Identifying Dates Closed. If the Patron Services parameter **Hours of Operation** designates the day of the week as a closed day for the branch (for example, Sunday), the due date moves to the next open day.

### Hourly Loans

For hourly loan due dates and times, Polaris checks these additional Patron Services parameters for the lending library: **Hours of operation** (for hours and closed days) and **Overnight loan period**. If the item is due after the lending library closes, one of the following events occurs:

- If the **Overnight loan period** parameter is set to permit automatic overnight loans, the due date is set to the next day the library is open. The due time is set to the library's opening time, plus any additional time specified by the library.
- If the **Overnight loan period** parameter is set to *not* permit automatic overnight loans, one of the following events occurs:
- If the loan period is less than 24 hours, the transaction is blocked. If you override the block, the due date is set to the next day the library is open, and the due time is set to the library's opening time, plus any additional time specified by the library. If you do not override the block, the item is due at the lending library's closing time on the current day.

#### Example:

An item is checked out on Thursday at 4:00 P.M. for a six-hour loan period. The lending library closes at 8:00 P.M. and opens on Friday at 10:00 A.M. If automatic overnight loans are permitted plus two additional hours, the item is due on Friday at 12:00 noon. If automatic overnight loans are not permitted, the transaction is blocked. If you override the



block, the item is due on Friday at 12:00 noon. If you do not override the block, the item is due when the library closes on Thursday at 8:00 P.M.

- If the loan period is 24 hours or more, the transaction is not blocked because the overnight loan setting is irrelevant.

You can set the **Overnight loan period** parameter at the System, Library, or Branch level.

### Non-Circulating Items

You can designate certain items as non-circulating in two ways:

- To make a specific item non-circulating for all patrons, select the **Non-circulating** checkbox on the Item Record workform - Circulation view. An advantage of this method is that patrons can see that an item is non-circulating in their PAC search results. You can set a special PAC description for these items. See [View circulation status names and edit descriptions](#).
- To make some items non-circulating for certain patron codes only, create a non-circulating loan period code. See [Add a loan period code](#). Then assign the loan period code to the appropriate patron codes, and specify a **Units** value of 0 for each restricted patron code. See [Add a loan period](#).

When a patron attempts to check out a non-circulating item, a block appears. If the circulation staff member overrides the block, and the item itself is non-circulating, Polaris assigns a loan period according to the loan period code in the item record. If the circulation staff member overrides the block, and the item is non-circulating for specified patron codes, Polaris assigns a loan period of one time unit as defined in the Loan Periods table.

### Renewal Parameter Settings

The **Renewal: Calculate based on due date** parameter determines how Polaris calculates due dates for renewals. You can set this parameter at the System level in Polaris Administration (staff client) by going to **Parameters > Patron Services**.

To calculate the due date for renewals by adding the loan period to	Set the parameter to
Today's date	No
The due date	Yes

**Notes:**

- By default, the parameter is set to No.
- This parameter does not apply to automatic renewals. Due dates for auto-renewals are calculated by adding the loan period to the due date. For information about auto-renewals, see [Automatic Renewal Process](#).

For more information about Patron Services parameters, see [Patron Services Parameters Reference](#).

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## Defining Loan Period Codes

The Loan Period Codes policy table sets the loan period codes for an organization. These codes are the names assigned to the various loan periods established by each organization. They are used in combination with patron codes to calculate due dates and fine amounts. The loan period codes are displayed as selections in the Loan Periods policy table, Fines policy table, and **Loan period code** box on the Item Record workflow.

The Loan Period Codes policy table can be displayed on an organization workflow or with the Administration Explorer. Loan period codes can be added from the system, library, and branch levels, but they are then available to all organizations. You cannot delete loan period code entries in Polaris Administration, but the system administrator can change the Loan Period Codes table using the Query Analyzer in SQL Server.

**Note:**

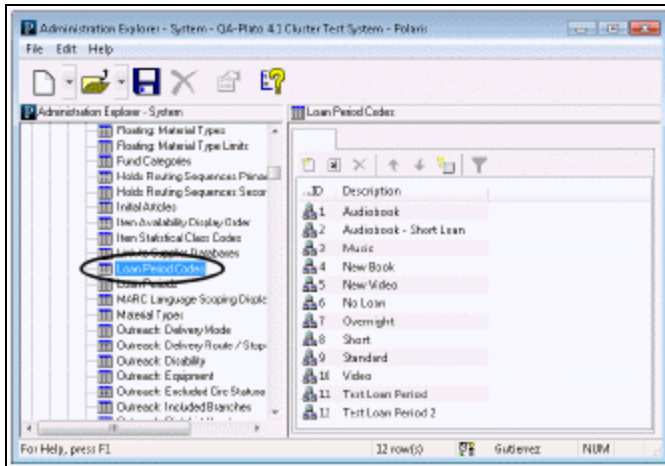
These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify loan period codes table: Allow.**

See: [Add a loan period code](#).

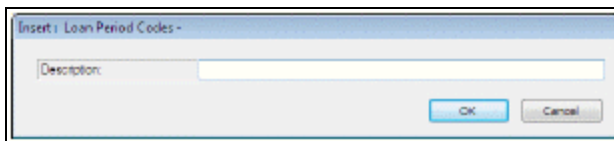
### Add a loan period code

To add a loan period code to the Loan Period Codes policy table:

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Loan Period Codes**. The Loan Period Codes table is displayed in the details view.



- Click  to display the Insert Loan Period Codes dialog box.




- Type the name describing the loan period in the **Description** box.

**Note:**

Loan period codes can be numbers, abbreviations, or full descriptions.

- Click **OK** on the dialog box. The Loan Period Codes policy table appears with the new loan period name. The status bar indicates that the modification is pending.
- Select **File > Save** to save your changes. The status bar indicates that the record is saved. The new loan period code appears in the policy table for every organization in the system.

**Related Information**

- Modify a table entry - Select an entry, click , and change the description. You should limit your changes to correcting spelling or using a different choice of words for the same loan period code.

**Important:**

Any changes to an existing loan period code are immediately applied to all records using the original code.

- Set up loan period durations - See [Defining Loan Period Durations](#). Default loan period durations are set with the Patron Services parameter **Fine and Loan period defaults**.

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## Defining Loan Period Durations

A loan period specifies how long an item can be checked out, based on the loan period code assigned to the item and the patron code of the person checking out the item. You can specify a different time period for each combination of loan period code and patron code. You can have only one loan period for a specific loan period code/patron code combination in each branch.

Loan periods are defined by entries in the Loan Periods policy table, which can be displayed on an organization workform or with the Administration Explorer. Loan periods can be set from the system, library, and branch levels. However, entries are assigned to specific branches, and you specify loan periods for each branch. Your setting for governing library determines which branch's settings are used in calculating the loan period. The default is the item's assigned branch.

When the table is opened at the system level, you can view, add, or change entries for any branch. At the library level, you can view, add, or change entries for the branches associated with the library. At the branch level, you can view, add, or change entries for the selected branch. You cannot delete loan period entries in Polaris Administration. The system administrator can change the Loan Periods table using the Query Analyzer in SQL Server.

**Note:**

The following System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify loan periods table: Allow.**

See: [Add a loan period](#)

### Add a loan period

To add a loan period in the Loan Periods policy table:

**Note:**

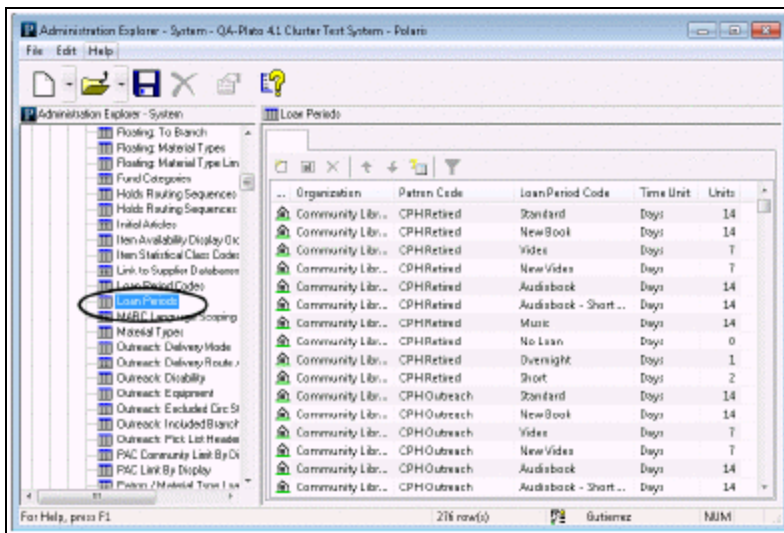
You must set up the Loan Period Codes policy table (see [Defining Loan Period Codes](#)) and Patron Code policy table (see [Defining Patron Codes](#))


before you do this procedure. Default loan period values are set with the Patron Services parameter **Fine and Loan period defaults**, and the default value is used when you add a new loan period code until you change it.

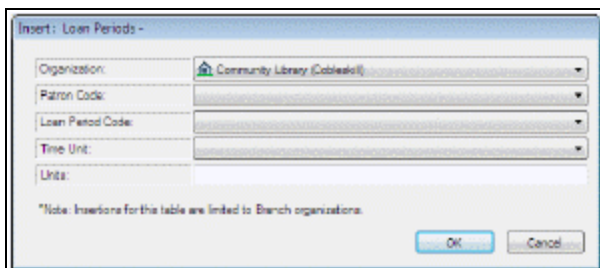
1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Loan Periods**. The Loan Periods table is displayed in the details view.

**Note:**

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.



2. Click  to display the Insert Loan Periods dialog box.



3. Select the branch for which you are assigning the loan period in the **Organization** list.

**Note:**

If the Loan Periods policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Select the patron code for the loan period in the **Patron Code** box.
5. Select an entry in the **Loan Period Code** box to associate with the patron code shown in the **Patron Code** box.

**Note:**

The options available in the **Load Period Code** box depend on the organization you selected. See [Defining Loan Period Codes](#).

6. Select one of the following loan duration units in the **Time Unit** box:

- **Days**
- **Hours**
- **Minutes**


7. Type the number of time units allowed for this loan period in the **Units** box.

**Note:**

To set up a non-circulating loan period code, type **0** in the **Units** box.

8. Click **OK** in the dialog box. The Loan Periods policy table appears with the new loan period entry. The status bar indicates that the modification is pending.
9. Select **File > Save** to save your changes. The status bar indicates that the record is saved.

**Related Information**

- Modify a table entry - Select the entry and click . You can change the loan period code and duration in an entry; the assigned library and patron code cannot be changed in an existing loan period.
- Set recurring or specific due dates by patron code only - See [Setting End-of-Term Due Dates](#).



- Undefined loan period - You can set a default value to use at check-out when a specific patron code/loan period code combination does not exist in the Loan Periods table. See [Undefined and Standard Loan Periods](#).
- Lending library schedule - Due date calculation takes into account the closed dates, closed days, and hours of operation for the lending library. See [Closed Dates and Days](#).
- Hourly loans - The Patron Services parameter **Overnight loan period** affects the date and time due for hourly loan items. See [Hourly Loans](#).

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## Setting End-of-Term Due Dates

To prevent items from circulating after a specific or recurring date, regardless of the item's loan period, your library can set an end-of-term (EOT) due date. Academic libraries and public libraries that work with schools may use this feature to make sure that no items are due after the last day of a term. Libraries may also use an EOT date to gather all circulating material by a certain date for inventory or another special purpose. You can include or exempt specific patron codes from a selected EOT date.

The staff client and Leap check system administration for end-of-term due date settings.

End-of-term dates affect circulation transactions in the following ways:

- If you attempt to check out or renew an item with a due date after the next EOT date, the item is assigned the EOT date. However, if a patron with an exempted patron code (such as a faculty member) is checking out the item, the due date can be after the EOT date.
- To override an EOT date for an item, you can assign a special loan period at check-out or renewal. See the Patron Services PDF Guide, Assign a special loan period.
- By default, Polaris uses the EOT date of the item's assigned branch, not the EOT of the check-out branch. You can set a different governing library for the calculation. See the PAC Customization PDF Guide, Governing Library for Circulation Transactions.

You set EOT dates with the Patron Services parameter **End-of-term due date options**, which is available at the system, library, and branch levels.

See: [Set an End-of-Term Due Date](#)

### Set an End-of-Term Due Date

To set an end-of-term due date:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Patron Services** tab in the details view.

**Important:**

Although you can set EOT dates at any organizational level, settings made at higher levels do not display at the branch level but may nevertheless override branch-level settings. To avoid this issue, set all EOT dates at the branch level, especially if different organizations need different dates.

2. Double-click the parameter **End-of-term due date options** to display the End-of-Term Due Date Options dialog box.
3. Click **New**. The End-of-Term Due Date dialog box appears.
4. Choose one of the following options to set the EOT date:
  - To set one numeric date, click **Specific date**, and select the date from the calendar in the **Specific date** box.

**Example:**

Friday, December 16, 2011

- To set the date by day of the month, click **The** and select a value in each of the three boxes (order, day, and month).

**Example:**

The third Friday of December

5. If you want the date to be a recurring date, select the **Recurring date** checkbox, and choose one of the following options:
  - To stop the EOT date from functioning after a specific number of occurrences, click **End after** and type the number in the occurrences box.
  - To stop the EOT date from functioning after a specific year, click **End after year** and type the year in the box.
  - To keep the EOT date functioning indefinitely, click **Never end**.
6. Click **OK**. The End-of-Term Due Date Options dialog box appears. The EOT date is listed in the left panel of the dialog box.
7. To prevent the EOT date from applying to specific patron codes, select the EOT date and do one of the following:
  - To exclude certain patron codes from all EOT dates, in the **Patron codes to exclude** list, select the checkbox next to each patron code for which EOT dates should not apply.

- To exclude certain patron codes from the selected EOT date only, select the **Separate exclusions** checkbox, then select the checkbox next to each patron code to exclude.
8. Repeat steps 3-7 for each EOT date you want to create.
  9. Click **Save**.  
The Administration Explorer appears.
  10. Select **File > Save** to save your changes.

#### Related Information

- Edit an end-of-term due date - On the End-of-Term Due Date Options dialog box, select an EOT date in the list, and select one of the following options:
- To change the date and recurrence information, click **Edit**. The End-of-Term Due Date dialog box appears. Make any changes, and click **OK**.
- To change the patron codes excluded from the selected EOT date, select the **Separate exclusions** checkbox, and select or clear the checkboxes next to the patron codes.
- To change the patron codes excluded from all EOT dates, clear the **Separate exclusions** checkbox, and select or clear the checkboxes next to the patron codes.
- Delete an end-of-term due date - On the End-of-Term Due Date Options dialog box, select the EOT date in the list, and click **Delete**. The EOT date is cleared from the list.
- Display a message at circulation - When a normal due date is shortened due to an End-of-Term date setting, you can set Polaris to display a message. Set the Patron Services parameter **Due date truncated: Prompt** to **Yes** at the system, library, or branch level.

## Defining Fines and Fees

Administration tables and parameters, combined with settings in the item and patron records, control how fines are calculated. The Administration settings are established when Polaris is first installed, but you can change them when a library or branch is added to the system, or when lending policies change.

Polaris Administration tables define patron codes and item fine codes, and determine the relationship between them. Patron codes and fine codes are shared by all libraries to make circulation consistent throughout the system. However, each branch in the system can establish different policies concerning fines for specific combinations of patron and item fine codes.

If an item is overdue at check in, the fine is automatically calculated based on these settings and posted to the patron's account. You can also set Polaris to waive fines automatically for items recovered at check out or renewal.

**Important:**

You set which branch's policies are used in fine calculation with the system-level Patron Services parameter **Consortium Circulation**.

**Note:**

Set the criteria that determine due dates before you set up fines.

The library may also define fees that are unrelated to fines. For example, you can charge patrons for hold requests, equipment rental, damaged or lost items, and checkout and renewal for certain types of items. You can charge a tax rate on those fees.

In Polaris Administration, you can set up the default fees, fee descriptions, and tax rates at the system level. At the branch level, you can determine which fee reasons are available to staff. You can also set up default replacement and processing fee amounts for items the library does not expect to recover, and how to handle overdue charges on lost items. You can use additional settings to control how the system processes the charges associated with lost items when the items are recovered at circulation.

If your library's policy limits the amount that can be accrued for overdue fines, you can use a system-level parameter to specify a limit on the overdue fine balance. If you set an

overdue fine limit, then the overdue fine balance in all patron accounts never exceeds this limit.

See also:

- [Calculating Overdue Fines](#)
- [Setting Fine Codes](#)
- [Setting Fine Amounts](#)
- [Defining Fee Descriptions](#)
- [Setting Tax Rates](#)
- [Setting Replacement Fee Defaults](#)
- [Overdue Fines on Lost Items](#)
- [Setting Lost Item Recovery Defaults](#)
- [Charging for Checkout and Renewal](#)
- [Setting a Maximum Overdue Fine Balance Limit](#)

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## Calculating Overdue Fines

Overdue fines are calculated when the item is checked in and the check-in date/time is past the due date/time. Ordinarily, for daily and weekly loans, a fine is calculated if an item is returned the day following the due date. The patron has until the end of the due date to return the book, even if the check-out time was early in the day. For hourly loans, a fine is calculated according to the exact time due. The Fines policy table associates patron codes with fine codes to determine the fine for the overdue item (see [Setting Fine Amounts](#)).

### **Note:**

If no fine can be determined in the Fines table, a message at check-in indicates that the fine cannot be calculated. The check-in clerk can set a fine manually, using the **Overdue Amount** box on the Resolve Billed Item dialog box, or by adding an entry in the Patron Status workform - Account view for the patron.

The following factors also affect the calculation of overdue fines:

- [Closed Dates](#)
- [Days Not Fineable](#)
- [Free Days](#)
- [Grace Periods](#)
- [Waiving Fines Automatically at Circulation](#)
- [Charging Fines Automatically at Check In](#)
- [Fines for Claimed Items](#)
- [Setting a Maximum Overdue Fine Balance](#)

### **Closed Dates**

Your library can specify, at the system level, whether Polaris charges overdue fines on library closed dates. By default, Polaris does not charge overdue fines on closed dates.

The following administrative settings affect how Polaris calculates overdue fines:

- Dates Closed policy table - Defines closed dates for each organization. A closed date is a day (for example, a holiday) when the library is closed that is an exception to the library's normal hours of operation. For more information, see the Polaris Administration Guide, Identifying Dates Closed.
- Consortium Circulation parameter - Determines which branch's closed dates Polaris uses when calculating overdue fines. For more information, see [Governing Library for Circulation Transactions](#) and [Defining Fines and Fees](#).
- Overdues: Charge fines for dates closed parameter - Determines whether Polaris charges fines on closed dates. The default setting is No. For more information, see the Patron Services Administration Guide, Patron Services Parameters Reference.

**Example:**

The governing library for overdue fines designates January 1 as a closed date. The Overdues: Charge fines for dates closed parameter is set to No. If a patron returns an item to that library on January 2, 2024, fines are not charged for January 1.

**Important:**

The system uses dates defined at the system or library level if none are defined for the governing branch. For consistent results, you might want to leave the Dates Closed policy table empty at the system and library levels and set closed dates only at the branch level. Alternatively, consider setting the same closed dates at the system, library, and branch levels.

## Days Not Fineable

You can designate specific days of the week as not fineable with the Patron Services parameter **Days not fineable**. You can set this parameter at the system, library, or branch level. You specify which branch's setting for this parameter is used in fine calculation with the system-level Patron Services parameter **Consortium Circulation** (see [Defining Fines and Fees](#)).

**Example:**

A library designates Sunday as a "day not fineable" because the library is closed. If an item is due on Saturday and returned at the branch on Monday, fines are not charged for Sunday, based by default on the setting for the receiving branch (and regardless of the setting for the item's



assigned branch). No Sunday is calculated in a fine. For a book seven days overdue, the fine is calculated for six days because Sunday is not counted. For a book 14 days overdue, the fine is calculated for 12 days.

**Important:**

The system uses days defined at the system or library level if none are defined for the governing branch. For consistent results, you may want to leave the **Days not fineable** parameter set to **None** at the system and library levels and set days only at the branch level, or set the same days at the system, library, and branch levels.

## Free Days

Free days are omitted from the overdue fine calculation during normal, bulk, or offline check in, and are typically set to cover unexpected closings. Libraries that allow items to be returned to non-Polaris libraries may find this feature especially useful; using the Free Days calendar control, staff can pick the date the item was returned at the non-Polaris library and the correct number of Free Days is automatically applied. The patron services parameters described below control free days. You can set the parameters at the system, library, and branch levels.

**Note:**

The governing library for fine calculation setting does not affect the free days parameters. The system always uses the free days settings of the receiving branch.

- **Free days (normal)** - Determines the default number of free days for normal check in. Staff members with the appropriate permission can change the setting at normal check in (Check In workform - Normal view) using the **Free days** box or calendar on the workform. The new setting applies to the current check-in session.
- **Free days (bulk)** - Determines the number of default days for bulk and offline check-in. This setting also applies to check in or renewal from the Patron Status workform - Items out view, the item record, Find Tool, and during check out when an item already checked out to one patron is checked out to another. Staff members with the appropriate permission can change the setting at bulk check in (Check In workform - Bulk view) and when uploading offline transaction files (Bookmobile workform) through the **Free days** box or calendar on these workforms. The new setting applies to the current check in or offline upload session, and does not affect check in from any other workform or the Find Tool.

When an item is billed and declared lost, no free days are applied to the overdue fine calculation.

A check-in transaction subtype indicates how many free days were applied when the item was checked in. Also, if the patron was charged overdue fines when the item was checked in, the Properties dialog box for the charge in the patron account shows how many free days were applied and the amount that was deducted for the free days. To open the dialog box, right-click the charge in the Patron Status workflow - Account view.

### Grace Periods

A grace period allows a patron to return an item a little late without incurring a fine. The item is still marked as overdue in the patron record. Grace periods are set in association with specific patron code/item fine code combinations in the Fines policy table. For more information, see [Setting Fine Amounts](#). A grace period differs from free days in that free days are omitted from the overdue fine calculation no matter when the item is checked in, whereas if an item is checked in after a grace period, the fine is calculated from the day or hour after the item due time.

#### Example:

If an item is checked out at 10:12 AM on Monday and circulates for a week, it becomes overdue at 12:00 AM on Tuesday (one minute after 11:59 PM on Monday). There is one grace day. Due to the grace period, the patron is not charged an overdue fine if the item is returned on or before 11:59 PM on Tuesday. If the item is returned after 11:59 PM on Tuesday, the patron is charged for one day overdue.

You can optionally include closed days and dates in your system's grace period calculations. Set the system-level Patron Services parameter **Overdues: Add closed days/dates to grace days** to **Yes** to include these in the calculation. The default setting is No.

If you set the option to **Yes**, and the grace period includes one or more "days closed" as defined in the Patron Services parameter **Hours of Operation** or "closed dates" as defined in the **Dates Closed** policy table according to the governing library for fine calculation, the grace period will be extended by the number of closed days or dates. For example, if the number of grace days is 2 and if Sunday is a closed day, no fine will be assessed if the item is due on Friday and returned on Monday. But if **Overdues: Add closed days/dates to grace days** is set to No (the default value), only the two grace

days, Saturday and Sunday, would be considered, and the fine would be assessed if returned on Monday.

**Important:**

The Free Days setting and the calculation of the actual fine amount are not affected by setting **Overdues: Add closed days/dates to grace days to Yes**. The grace period exempts the patron from the fine, but if grace days are exceeded, the fine is calculated as if there were no grace period.

**Waiving Fines Automatically at Circulation**

Two system-level Patron Services parameters control whether fines are waived automatically when items are recovered at circulation. To automatically waive the fine if an overdue item is found during check-out, set **Overdues: Clear fine if recovered at check-out to Yes**. To automatically waive the fine if the patron is renewing an overdue item, set **Overdues: Clear fine if recovered at renewal to Yes**. Both parameters are set to **No** by default. (These settings also apply to SIP self-check units.)

**Note:**

Separate settings control how overdue fines for lost items are handled. See [Overdue Fines on Lost Items](#).

**Charging Fines Automatically at Check In**

The Patron Services parameter **Check in: auto-charge fine from item work form and find tool context menu**, controls whether overdue fines are automatically charged to the patron account when overdue items are checked in from the Item workform, the Find Tool context menu, or the Patron Status workform - Items Out view. The parameter is available at the system, library, and branch levels and is set to **Yes** by default.

When the parameter is set to **Yes** and an overdue item is checked in, the fine is automatically charged to the patron account. If the overdue item can fill an active hold request, the hold request message appears and the staff member takes action on the hold request message. (When the parameter is set to **Yes** and a billed item is checked in, the Resolve lost/billed item dialog box appears, the staff member resolves the billed charges, and the item is checked in. If the billed item can fill a request, the hold request message appears before the Resolve lost/billed item dialog box. The staff member takes action on the hold request message first.)

If the parameter is set to **No**, the Check In - Fine dialog box appears when the item is overdue, and the staff member resolves the fine accordingly. However, if the item can fill a hold request, the hold request message always appears first.

### **Fines for Claimed Items**

A system-level Patron Services parameter controls whether fines are charged if an overdue item with a status of Claimed Returned or Claimed Never Had is checked in or checked out. To automatically waive overdue fines for these items at circulation, set **Overdues: Charge fines for claimed items** to **No**. This setting waives fines for overdue claimed items found at renewal, normal and offline check in and check out, and Polaris ExpressCheck check out. The parameter is set to **Yes** by default.

### **Setting a Maximum Overdue Fine Balance**

If your library policy is that overdue fines cannot accrue over a certain dollar amount in the patron overdue fine balance, you can set a limit. See: [Setting a Maximum Overdue Fine Balance Limit](#).

---

## Setting Fine Codes

Fine codes represent the various fine policies used in combination with patron codes to determine fine amounts. Fine codes are displayed as selections in the Fines policy table and the **Fine code** box on the Item Record workflow.

Fine codes are defined as entries in the Fine Codes policy table, which can be displayed on an organization workflow or with the Administration Explorer. Fine codes can be added from the system, library, and branch organization levels, but they are then available to all organizations. You cannot delete fine code entries in Polaris Administration, but the system administrator can change the Fine Codes table using the Query Analyzer in SQL Server.


### Note:

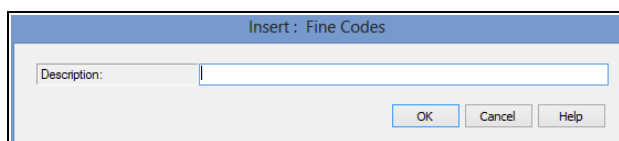
These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify fine codes table: Allow.**

See also: [Add a fine code](#)

### Add a fine code

To add a fine code in the Fine Codes policy table:

1. In the Administration Explorer, open the **Policy Tables** folder for the organization, and select **Fine Codes**. The Fine Codes table is displayed in the details view.
2. Click  to display the Insert Fine Codes dialog box.




3. Type text describing the fine code in the **Description** box.
4. Click **OK** on the dialog box. The Fine Codes policy table appears with the new fine

code name. The status bar indicates that the modification is pending.

5. Select **File > Save** to save your changes.

The status bar indicates that the record is saved. The new fine code is available to all organizations and appears in the Fines table. See [Setting Fine Amounts](#). Default fine amounts, maximum fine amounts, and grace periods for new fine codes are set with the Patron Services parameter **Fine and Loan period defaults**.

### ***Related Information***

Modify a table entry - Select the entry, click , and change the description.

#### **Important:**

Any changes to an existing fine code are immediately applied to all records using the original code.

---

## Setting Fine Amounts

Fine amounts are set based on the patron code of the person being charged and the fine code assigned to the item. You can specify a different fine amount for each combination of patron code and fine code, as well as a maximum fine and a grace period for each combination (see [Grace Periods](#)).

Since fine amounts are defined using patron codes, fine codes, and loan periods, you must set up the Patron Codes, Fine Codes, and Loan Periods policy tables before you can define fine amounts. See: [Defining Patron Codes](#), [Defining Loan Period Durations](#), and [Setting Fine Codes](#).

Fine amounts are set with entries in the Fines policy table, which can be displayed on an organization workflow or with the Administration Explorer. Fines can be set from the system, library, and branch levels. However, entries are assigned to specific branches, and you specify fines for each branch in Polaris. You specify which branch's entries in this table are used in fine calculation with the system-level Patron Services parameter **Consortium Circulation**. See: [Defining Fines and Fees](#).

When you open the table at the system level, you can view, add, or change entries for any branch. At the library level, you can view, add, or change entries for the branches associated with the library. At the branch level, you can view, add, or change entries for the selected branch. You cannot delete fine entries in Polaris Administration. The system administrator can change the Fines table using the Query Analyzer in SQL Server.

**Note:**

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify fines table: Allow.**

See also: [Add a fine amount](#)

### Add a fine amount

To add a fine amount to the Fines policy table:


**Note:**

The default fine amount, default maximum fine, and default grace period are set with the Patron Services parameter **Fine and Loan period defaults**, and when you add a new fine code the default value is used until you change it. If for some reason a fine amount cannot be calculated, the setting for the system-level parameter **Undefined Fine Amount** is used. This setting is also used automatically when a new organization or patron code is added to the table.

1. In the Administration Explorer, open the **Policy Tables** folder for the organization, and select **Fines**. The Fines table is displayed.

**Note:**

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

2. Click  to display the Insert Fines dialog box.
3. Select the organization for which you are assigning the fine in the **Organization** box.

**Note:**

If the Fines policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Select the patron code for the fine amount in the **Patron Code** box.
5. Select a fine name in the **Fine Code** box to associate with the patron code shown in the **Patron Code** box. The options available in the **Fine Code** box depend on the organization you selected. See [Setting Fine Codes](#).

**Note:**

If a relationship between the patron code and fine code cannot be found in the Fine Code policy table, Polaris uses the setting in the Patron Services parameter **Undefined fine amount**, which is set at the system level. The default value is \$5.00. This value is also used to automatically populate the table if a new branch or patron code is added.



- In the **Amount** box, type the amount of money to fine for a single loan period unit for the item.

**Example:**

The loan period unit for a certain type of item is daily. To set up a fine of 10 cents per day, type \$0.10 in the **Amount** box.

Loan period units are defined in the Loan Period policy table. See [Defining Loan Period Durations](#). Polaris uses the loan period unit for which an item was charged and the value you put in the **Amount** box to calculate the fine.


- In the **Maximum Fine** box, type the total amount that can be fined for items associated with this fine description and charged to the selected patron code.
- In the **Grace Units** box, type the number of loan period units allowed for an overdue item before Polaris begins calculating a fine.

**Note:**

The actual time specified by the **Grace Units** setting depends on the loan period unit used when the item was checked out. For example, if the item is checked out for 14 days and the grace unit is 1, then the grace period is one day. Any items returned the day after they were due are not charged an overdue fine. A grace period of 0 means that items must be returned by the end of the date they are due. Otherwise, overdue charges apply. Loan period units are defined in the Loan Period policy table.

- Click **OK** in the dialog box. The Fines policy table appears with the new fine name. The status bar indicates that the modification is pending.
- Select **File > Save** to save your changes. The status bar indicates that the record is saved.

**Related Information**

- Modify a table entry** - Select the entry and click . You can change the amount of the fine, maximum chargeable fine, and the grace period for an existing fine entry.
- Days not fineable** - The Patron Services parameter Days not fineable affects fine calculation. See [Days Not Fineable](#).

- **Free days** - Patron Services parameters related to free days also affect fine calculation. See [Free Days](#).
- **Fees** - The library may charge patrons for reasons unrelated to fines for overdue materials. For more information, see [Defining Fee Descriptions](#).

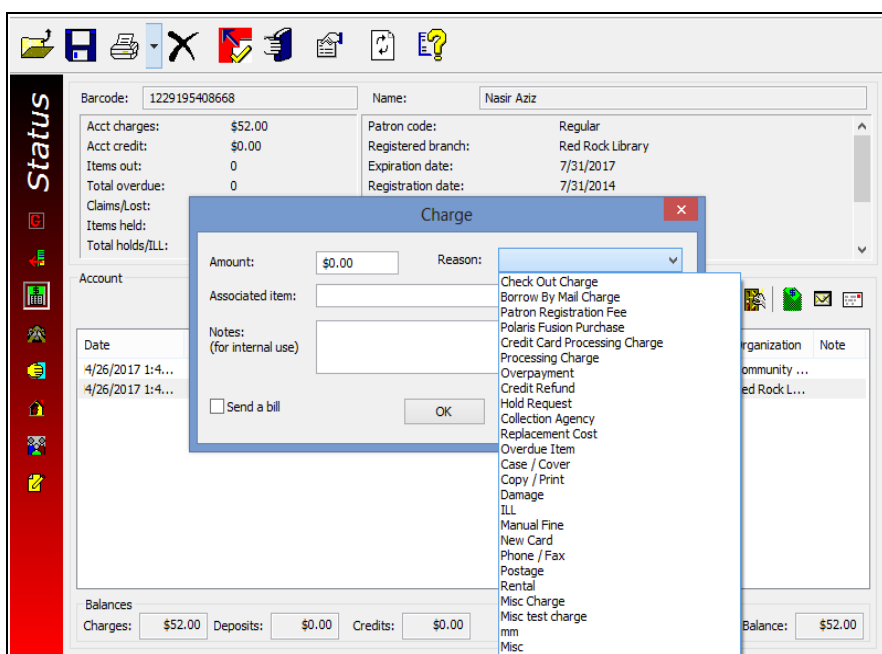
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## Defining Fee Descriptions and Tax Rates

Fees are charges that are unrelated to overdue fines. Examples of fees include patron registration charges or the price of a pair of headphones. Tax rates are for libraries that charge a Goods and Services Tax (GST). Using the Fee Descriptions policy table, you can:

- Enter fee descriptions so library staff can select them from a predefined list.
- Set a default amount for each fee description.
- Set a tax rate for each fee description.

Entries in this policy table appear as selections on workform views and dialog boxes where you handle patron charges, such as the **Reason** list from which you can select a fee reason when adding a charge to a patron's account. Entries also appear in Leap.



You must go to the Administration Explorer to view the Fee Descriptions policy table. All organizations in a Polaris installation must agree on the fee descriptions. You can add and change entries in the Fee Descriptions policy table, but you cannot delete them.

You can create fee descriptions at the system and library levels, but the entries are assigned to the system. You must be working at the system level to configure tax rates and default fee amounts for fee descriptions. Tax rates and default fee amounts do not appear in the library or branch level Fee Descriptions policy tables.

At the branch level, you can set which reasons are available to branch staff and determine the order of the branch-level selections. Some libraries prefer alphabetical order; others prefer to put the most commonly used selections first. You can also edit the description display text, however the system applies these changes system-wide.

**Note:**

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify fee descriptions table: Allow.**

See also:

- [Add a fee description and tax rate entry](#)
- [Set fee descriptions for branch-level display](#)

**Add a fee description and tax rate entry**

Fees are charges that are unrelated to overdue fines. Examples of fees include patron registration charges or the price of a pair of headphones. Tax rates are for libraries that charge a Goods and Services Tax (GST). For overview information, see [Defining Fee Descriptions and Tax Rates](#).

To add a fee description to the Fee Descriptions policy table:

**Note:**

Check existing descriptions before you add a new one. You cannot delete duplicate descriptions.

1. In the Administration Explorer, open the **Policy Tables** folder for the organization, and select **Fee Descriptions**. The Fee Descriptions table is displayed in the details view.

**Note:**

In the Fee Descriptions table, ID numbers preceded by a minus sign are supplied by the system and used in system processes.

- Click  to display the Insert Fee Descriptions dialog box.




- Enter text describing the type of fee in the **Fee Description** box.
- Enter a **Default Amount**.  
Default amount starts as \$0.00.
- (Optional) Select a **Tax Rate**.
- If this fee description includes a tax rate, select **Yes**. Otherwise, select **No**.
- Click **OK**.

The Fee Descriptions policy table appears with the new fee description name. The status bar indicates that the modification is pending.

- Select **File > Save** to save your changes.

The status bar indicates that the record is saved.

### **Related Information**

- Modify a table entry - Select the entry, click , and change the description.

#### **Important:**


- The system immediately applies any changes to an existing fee description or tax rate to all records using the original fee.
  - A changed tax rate might not appear in Leap unless you perform an IISRESET, clear the browser's cache, and refresh the page.
  - For accounting purposes, do not update fee descriptions that have been used for charges on patron accounts. If you make changes to fee descriptions, the system applies those changes to past charges and new charges.
- Set branch-level display - See [Set fee descriptions for branch-level display](#).

- Replacement fees - You can set a default replacement fee amount and a processing fee amount for items the library cannot recover. See [Setting Replacement Fee Defaults](#).

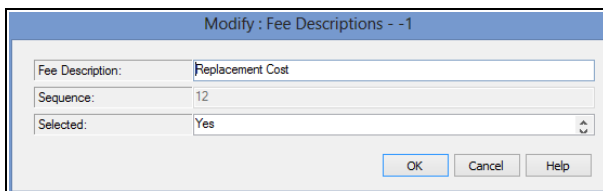
### Set fee descriptions for branch-level display

Fee descriptions are displayed to staff for selection when the staff member adds a charge to the patron account.

To set the fee descriptions that should display to staff at a specific branch, edit the fee descriptions, and determine the order of entries in the fee reason list:

1. In the Administration Explorer, open the **Policy Tables** folder for the branch, and select **Fee Descriptions**. The Fee Descriptions table (branch-level version) is displayed in the details view. At the branch level, the table displays a Selected column, indicating whether an entry is displayed for staff selection, and a Sequence column, indicating the entry's position on the list of reasons.
2. To change an entry's display setting, select the entry and click  or double-click the entry. For example, if the branch does not use Borrow by Mail, you may want to suppress **Borrow by mail charge** from display in the fee reasons list.

The Modify fee descriptions dialog box opens.

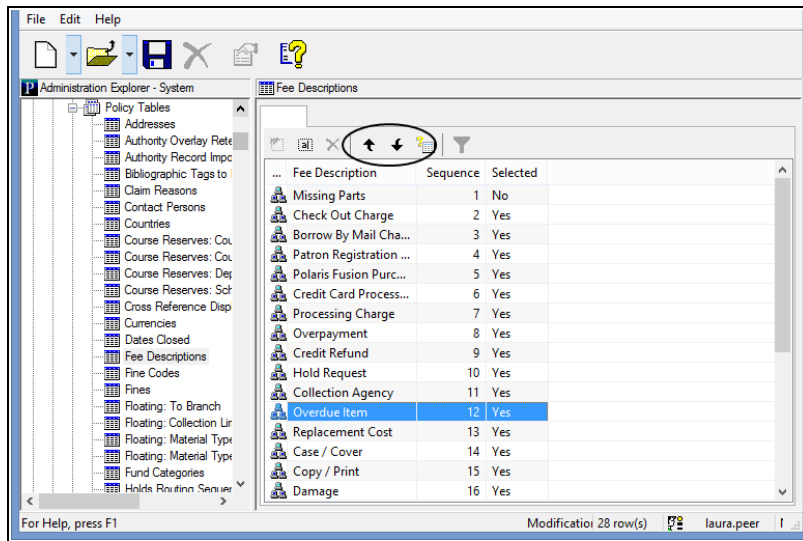


3. Select **Yes** or **No** in the Selected box to display or suppress the fee reason.
4. To modify the description, type the new description in the **Fee Description** box.

#### Note:

The modified description is displayed only at the branch for which you made the setting. It is not changed at the system level.

5. Click **OK**.
6. To move an entry up or down in the selection list, select the entry and click the up or down arrow at the top of the table.



7. Select **File > Save** to save your changes.

---

## Setting Replacement Fee Defaults

When a patron must be charged to replace a lost, damaged, or long overdue item, Polaris can use the original price of the item or a default cost set by library policy. If the item's original price is unknown (the **Price** box on the Item Record workform is blank), the default replacement cost is used. (If the item's price was \$0.00, no replacement cost is charged.) You may choose to use the default replacement cost for every item, whether the original price is known or not. In addition, you can specify a processing fee that is added to the replacement cost. You can set separate replacement costs and processing fees for each material type.

The Patron Services parameter **Replacement fee options** controls default cost settings. You can set the parameter at the system level, library, or branch level. When an item is manually declared lost, or is automatically declared lost when it is billed, the **Replacement fee options** settings for the item's assigned branch are used. The settings for the governing branch for fine calculations are used to calculate the overdue fine, if any. See [Defining Fines and Fees](#).

See also: [Set the replacement charge defaults](#)

### Set the replacement charge defaults

To set the defaults for item replacement charges:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Replacement fee options** to display the Replacement Fee Defaults dialog box.



Replacement Fee Defaults

Use item record price field or default
  Use defaults only

Material Type	Replacement Cost	Processing Fee
Art	\$24.00	\$0.00
Audiobook	\$25.00	\$0.00
Book	\$25.00	\$0.00
Book and CD	\$20.00	\$5.00
Children's Video	\$25.00	\$0.00
eBook	\$20.00	\$5.00
Equipment	\$25.00	\$0.00
Kellie R-Rated Realia	\$25.00	\$0.00
Kellie Rental Manuscript	\$25.00	\$0.00
Kellie Rental Score	\$25.00	\$0.00
Kit - Audiovisual	\$25.00	\$0.00
Kit - Realia	\$25.00	\$0.00
Map	\$25.00	\$0.00
Museum Pass	\$20.00	\$5.00
Music	\$25.00	\$0.00
New / Popular Book	\$25.00	\$0.00
Periodical	\$25.00	\$0.00
Picture, Photo	\$25.00	\$0.00
really long material type for testing dis...	\$20.00	\$5.00

OK Cancel Help

3. Choose how replacement charges should be calculated:

- To use the original purchase price (if specified in the item record), click **Use item record price field or default**. If the original purchase price is not available for the calculation, the value specified in the **Replacement cost** field for the material type is used.
- To always use the replacement cost for the material type, and ignore actual purchase prices, click **Use defaults only**.

**Note:**

If the original purchase price is specified in the item record as \$0.00 (the item was free), no replacement cost is charged.

4. For each material type, in the **Replacement Cost** field, type the standard replacement value that is specified by library policy.
5. For each material type, in the **Processing Fee** box, type the amount to charge a patron for processing a replacement item.
6. Click **OK** on the dialog box.

---

## Overdue Fines on Lost Items

An item may be declared lost in the following situations:

- A patron notifies the library that a checked-out item is lost. Then a staff member manually declares the item lost.
- Billed items may be declared lost automatically, a system-level decision. (If they are not automatically declared lost, a staff member may manually declare a billed item lost.)

The Patron Services parameter **Lost item charge options** determines how overdue fines are handled at the time an item is billed and automatically set to lost, or when a staff member declares the item lost.

Most options controlled by the **Lost item charge options** parameter are available at the system, library, and branch levels. The governing library setting for fine calculation determines which library's settings rule lost item charges. For more information about governing library settings, see [Governing Library for Circulation Transactions](#).

### Settings for Lost Item Charge Options

The **Lost item charge options** parameter offers the following settings:

- **Overdues: billed items set to lost** - System level only. Setting the item status to Lost at the time the item is billed will ensure the most consistent results for lost item recovery. However, leave this option unchecked if libraries in your system prefer to declare the item lost manually.
- **Charge overdue with bill** - For best results, check this option if it is available (not grayed out). When this option is selected, the overdue charge is included in the bill regardless of whether the billed items are set to lost. If you prefer not to charge overdues with the bill, select the option **Charge overdue when returned**. The replacement fee and optional processing fee will still be billed. If your library has set a system-wide limit for the maximum fine balance, it is recommended that you do not select this option.
- **Charge overdue when declared lost** - Like **Charge overdue with bill**, this option is available only if **Charge overdue when returned** is not set. For best results, check

this option if it is available. If the library does not charge overdues when items go to Lost as a matter of policy, the option **Charge overdue when returned** should be checked instead.

- **Charge overdue when returned** - Select this option if the library policy is to charge the overdue fine only if and when the lost item is returned. If you select this option but do not set **Overdues: billed items set to lost**, the library charges the overdue fine when a lost item is recovered but does not assume an item is lost until the patron comes in and says he cannot find it. In this situation, you will see the following effects:
  - No automatic lost item recovery options are possible because the item's status is not Lost.
  - The patron is billed for the replacement cost and optional processing fee. However, the overdue fine remains uncharged and unresolved.
  - If the patron brings the item back, a staff member checks the item in and waives the replacement and optional processing fees. The overdue fine is calculated at that time and the staff member pays, waives, or charges the overdue fine.
  - If the patron says he cannot find the item, the staff member declares the item lost on the Patron Status workform - Items out view, then pays, waives or leaves the replacement and optional processing fees; the overdue is calculated at that time. The item is now lost, so lost item recovery options may apply (see [Setting Lost Item Recovery Defaults](#)). (If the staff member does not declare the item lost, it stays out to the patron until checked in and the overdue fine is calculated at that time.)

### Policy Decisions for Lost Item Charge Options

Different combinations of settings reflect your library's policy:

- If you want to include overdue fines with the bill, and billed items are automatically set to lost, select the following options:
  - **Overdues: billed items set to lost** (system level only)
  - **Charge overdue with bill**
  - **Charge overdue when declared lost**
- If you want to include overdue fines with the bill, and billed items are **not** automatically set to lost, select the following options:

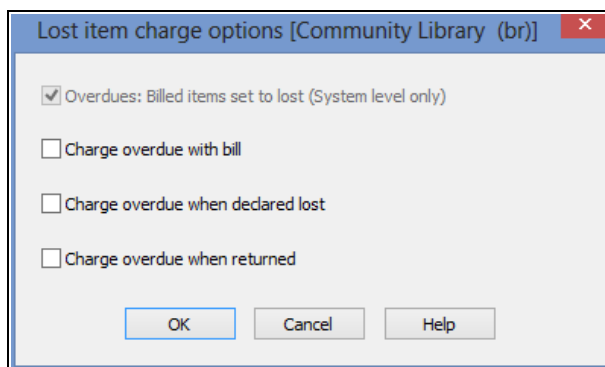
- **Charge overdue with bill** - This option should not be selected if your library specifies a maximum overdue fine balance amount.
- **Charge overdue when declared lost**
- If you want to charge overdue fines when an item is returned, and billed items are not automatically set to lost, select **Charge overdue when returned**.
- If you want to charge overdue fines when an item is returned, and billed items are automatically set to lost, select the following options:
  - **Overdues: billed items set to lost** (system level only)
  - **Charge overdue when returned**

See also: [Set lost item charge options](#)

### Set lost item charge options

To set whether billed items are automatically set to Lost (system level only), and how to handle overdue charges on billed and lost items:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Lost item charge options** to display the Lost item charge options dialog box.



#### Tip:

See [Policy Decisions for Lost Item Charge Options](#) for suggested combinations of settings in this dialog box.

3. (System level only) Select **Overdues: billed items set to lost** to make the status of billed items automatically set to Lost.

**Note:**

Set this parameter to **Yes** if you use collection agency services. This ensures that if a lost item is recovered, the system reports the recovery correctly.

4. To charge overdue fines when an item's status changes to lost, select one or both of the following options:
  - **Charge overdue with bill** - If **Overdues: billed items set to lost** is selected for the system, when the billed item's status automatically changes to Lost the overdue charge is placed on the patron account, along with other appropriate charges related to lost items (see [Setting Replacement Fee Defaults](#)). If **Overdues: billed items set to lost** is not selected for the system, the billed item's status remains Out. The overdue charge and any other charges related to billed items are placed on the patron account.
  - **Charge overdue when declared lost** - Select this option to charge overdue fines to the patron account when an item is declared lost by a staff member.

**Tip:**

When **Charge overdue when returned** is selected, replacement costs are charged immediately when the item's status changes to Lost, but not overdue fines. If your library uses a collection agency, the patron would be reported only for the total replacement costs. (However, any overdue fines already owed would be included in the collection agency calculation.)

5. To charge overdue fines to the patron account when a lost item is recovered at circulation, instead of when the item's status changes to Lost, select **Charge overdue when returned**.

**Note:**

If you select **Charge overdue with bill**, **Charge overdue when declared lost**, or both, this option is unavailable.

Libraries that use this option typically charge any replacement and processing fees to the patron when the item's status changes to Lost, but not overdue charges. If the item is recovered, replacement and processing fees are then waived or credited (if already paid), the overdue fine is calculated up to the point when the item was returned, up to the maximum fine amount, and the overdue charge is placed on the patron account.

**Important:**

If you select **Charge overdue when returned**, set the **Lost item recovery** parameter for lost-and-paid items to **Charge** for overdues. See [Set the lost item recovery default actions](#).

6. Click **OK**.

**Related Information**

- Charge resolution when lost items are recovered - See [Setting Lost Item Recovery Defaults](#).
- Bills - See [Overdue Notices, Bills, and Combined Notices](#).
- Overdue fines on lost items in estimated fines - See [Set up estimate accrued fine calculations and blocking](#).

**Setting a Maximum Overdue Fine Balance Limit**

You can use the System-level Patron Services parameter **Overdues: maximum overdue fine balance** to define a maximum amount for overdue fine balances so that patron accounts never exceed a certain dollar amount for overdue fines. By default, this parameter is disabled (set at \$0.00). To enable this parameter, the amount must be set above \$0.00. Once enabled, the maximum overdue fine balance is applied at the System level—to all patron accounts for all branches.

When a maximum overdue fine balance amount greater than zero is entered in the parameter, the system checks the total current overdue fine balance in patrons' accounts before adding overdue fines. As each overdue item is checked in or renewed, the patron's account is charged the overdue fine until the total current balance reaches the dollar amount limit defined in the parameter. Once the limit is reached, fines for subsequent overdue items are not added to the patron's account.

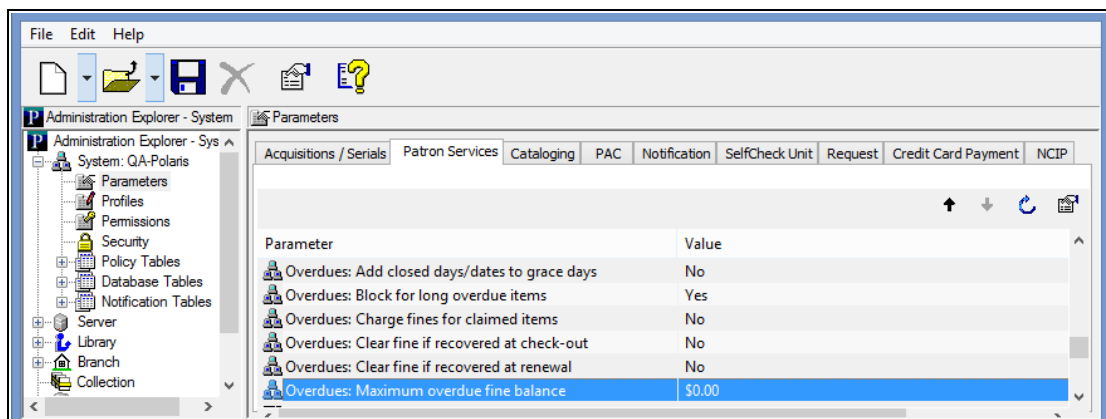
If a dollar amount is entered in the parameter, the threshold is checked when overdue fines are assessed during check-ins or renewals from: the Polaris staff client; self-check units (Polaris ExpressCheck and SIP); Leap; PowerPAC (renewals); and the Polaris API.

**Note:**

When enabled, this parameter sets the maximum dollar amount for total current overdue fines only. The limit is applied to a patron's account at check in or renewal; it does not apply to manually-added charges, replacement costs or other fees.

To set a maximum overdue fine balance amount for all patron accounts in your library system:

1. In the Administration Explorer tree view, open the **Parameters** folder for the System.
2. Click the **Patron Services** tab in the details view.
3. Double-click **Overdues: Maximum overdue fine balance**, and type a dollar amount.



4. Select **File > Save** to save the setting.

#### Notes:

If your library specifies a maximum overdue fine balance amount, it is recommended that charges for overdue fines are not included on bills for lost items. This is because the overdue fine amount reflected on the bill may not be accurate. See [Settings for Lost Item Charge Options](#).

In addition, when a maximum overdue fine balance is set, the overdue fine amounts displayed in the Estimated Fines dialog box may not be the same as the actual amounts calculated at check-in or renewal. See the Patron Services PDF Guide, Estimate fines on currently checked out items topic.

---

## Setting Lost Item Recovery Defaults

When a lost item is recovered at check out or check in, the charges associated with the item must be resolved (charged, waived, credited, or left as is, as appropriate). With the Patron Services parameter **Lost item recovery**, you can set the default actions so that the charges are resolved automatically when lost items are recovered at circulation, and staff members do not have to resolve each item manually. Charges for lost items may include a replacement charge, a processing fee, and an overdue charge. You can set up separate resolutions depending on whether the charges have been paid or remain unpaid.

The governing library setting for lost item recovery (transacting library or lending library) determines which library's settings rule when a lost item is recovered at circulation. The governing library for fines determines how the overdue charges are calculated. For more information about governing library settings, see [Set fine receipt options](#). The replacement charge and processing fee are calculated according to the settings for the item's assigned branch. See [Setting Replacement Fee Defaults](#).

You can set separate default actions for normal check in, bulk check in, and check out. Your settings determine how lost items are resolved in the online staff client and in the following situations:

- Offline circulation - Uses check-out and normal check-in settings.
- Polaris ExpressCheck - If you have set Polaris ExpressCheck to permit check out of lost items, your settings for normal check out are used. For information about Polaris ExpressCheck settings, see the *Polaris ExpressCheck Administration Guide*.

**Note:**

SIP/NCIP circulation does not support default settings, and returns error messages for lost items.

See also: [Set the lost item recovery default actions](#)



## Set the lost item recovery default actions

To set the automatic actions for resolving the charges associated with lost items when they are recovered at circulation:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view. To see the patron services parameters list, select the appropriate level - System, Library, Branch.
2. Double-click **Lost item recovery** to display the Lost Item Recovery Options dialog box. The dialog box opens with the **Lost Item Recovery** tab selected.

	Auto waive/charge lost item fees	Overdue fine	Processing fee	Replacement cost
Check-in: Bulk mode	<input type="checkbox"/>	▼	▼	▼
Check-in: Normal mode	<input type="checkbox"/>	▼	▼	▼
Check-out	<input type="checkbox"/>	▼	▼	▼

3. On the **Lost Item Recovery** tabbed page, set the processing defaults that should apply when lost items are recovered at circulation, but the charges related to the items have not been paid or waived:
  - a. In the **Default action if recovered in** fields, specify the maximum time period for which automatic changes to the patron account should apply. For any specific item, the period you specify is measured from the point when the item was declared lost. The maximum numerical value is 999 (months or years).

### Important:

This feature depends on the availability of patron ID information. If your organization purges patron ID information from transactions after a set period of time, be sure to coordinate the settings so that the patron ID is available if the lost item is recovered within the time period you specify. See [Removing Patron ID Information from Transaction Files](#).

- b. Select the checkbox for each circulation situation (normal check in, bulk check in, and check out) where you want to charge or waive lost item fees automatically.

If a lost item is recovered in one of the circulation situations you selected before the time specified in the **Default action if recovered in** fields, fees are

charged or waived automatically according to your settings. If the item is recovered after the specified time, the circulation transaction continues but no changes are made to the patron account.

If you do not select a circulation situation, automatic processing is not applied, and staff members must resolve the charges when a lost item is recovered in that situation. See the Patron Services PDF Guide, Resolve a lost-and-unpaid item at circulation.

c. For each circulation situation that you checked, select the automatic action to take for each fee (**Overdue fine**, **Processing fee**, and **Replacement cost**):

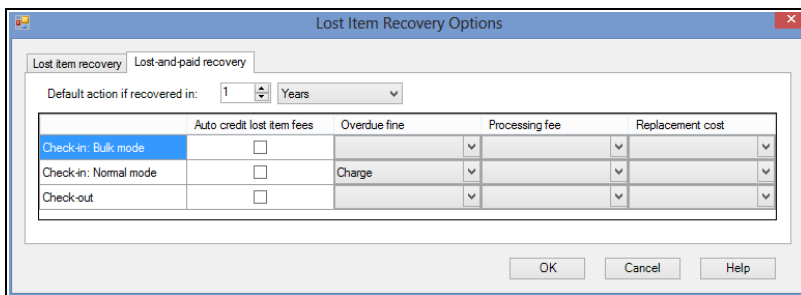
- **Charge** - This option leaves the charge related to the lost item unchanged in the patron account.
- **Waive** - This option waives the charge in the patron account. For overdues, the charge is placed in the patron account and then automatically waived.

The patron’s Account Transaction Summary will be updated according to the action you specify.

**Note:**

For more information about setting replacement costs and processing fees, see [Setting Replacement Fee Defaults](#).

4. Click the **Lost-and-paid recovery** tab, and set the processing defaults that should apply when lost items are recovered at circulation, and the charges related to the items have already been paid.



a. In the **Default action if recovered in** fields, specify the maximum time period for which automatic processing should apply. For any specific item, the period you specify is measured from the point when the item was declared lost. The maximum numerical value is 999 (months or years).

**Important:**

This feature depends on the availability of patron ID information. If your organization purges patron ID information from transactions after a set period of time, be sure to coordinate the settings so that the patron ID is available if the lost item is recovered within the time period you specify. See [Removing Patron ID Information from Transaction Files](#).

- b. Select the checkbox for each circulation situation (normal check-in, bulk check-in, and check-out) where you want to credit lost item fees or leave them as is automatically.

If a lost item is recovered before the time specified in the **Default action if recovered in** fields, in one of the circulation situations you selected, payments are credited or left as is automatically according to your settings. If the item is recovered after the specified time, the circulation transaction continues but no changes are made to the patron account.

If you do not select a circulation situation, automatic processing is not applied, and staff members must resolve the account when a lost item is recovered in that situation. See the Patron Services PDF Guide, Resolve a lost-and-unpaid item at circulation.

- c. For each circulation situation that you checked, select the automatic action to take for each fee (**Overdue fine, Processing fee, and Replacement cost**):
- **Charge** - For overdue fines only. This option charges overdue fines to the patron's account calculated from when the item went overdue to the day it was recovered. Libraries that set the **Lost item: Charge overdue when returned** parameter (see [Set lost item charge options](#)) typically charge any replacement and processing fees to the patron when the item's status changes to Lost, but not overdue charges. If the item is recovered, replacement and processing fees are then waived or credited (if already paid), the overdue fine is calculated up to the point when the item was returned, up to the maximum fine amount, and the overdue charge is placed on the patron account.
  - **Credit** - This option credits the patron's account for the payment amount related to the lost item. If an amount was partially paid, the paid amount is credited and the unpaid balance is waived. For payments made by credit card:
    - **PayPal PayFlow Link** - A "dummy" refund is created instead of a credit. The refund will appear as a refund in the Polaris patron account and a refund transaction created. This transaction is available for reporting in the Refunds

to Credit Card Payments report . You can use the report to cross-check transactions logged in Payflow Link. (Note that the refund must also be made from Payflow Link.) Instead of automatically crediting the patron's account, you may want to set the lost-and-paid item recovery options to Leave as is. With this setting, the payments remain in the Polaris patron account and the refund or credit can be done from Payflow Link.

- **PayPal Payflow Pro** - Polaris issues a refund to the credit card account.
- **Payments Gateway** - A "dummy" refund is created instead of a credit. The refund will appear as a refund in the Polaris patron account and a refund transaction created. This transaction is available for reporting in the Refunds to Credit Card Payments report. You can use the report to cross-check transactions logged in the Virtual Terminal. (Note that the refund must also be made from the Virtual Terminal.) Instead of automatically crediting the patron's account, you may want to set the lost-and-paid item recovery options to Leave as is. With this setting, the payments remain in the Polaris patron account and the refund or credit can be done from Payments Gateway. Or your library may choose to disable all automatic recovery actions, forcing staff to create manual refunds when a lost-and-paid item is recovered.
- **Comprise SmartPay** - Automatic credits are not supported. The payment is left as is.
- **EnvisionWare (integrated)** - Automatic credits are not supported. The payment is left as is.
- **Leave as is** - This option leaves the transactions related to the lost item unchanged in the patron account.

The patron's Account Transaction Summary will be updated according to the action you specify.

### ***Related Information***

Separate settings control whether overdue fines are charged when an item is declared lost, when an item's status is automatically changed to lost when it is billed, or when a lost item is recovered at circulation. See [Overdue Fines on Lost Items](#).

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## Charging for Checkout and Renewal

You can charge patrons for checking out items of specified material types and optionally charge for renewing them, or charge only for renewal. You can also choose to waive the charge for certain patron codes. The charge policy is applied according to the settings of item's assigned branch. Your renewal settings also apply to Polaris PowerPAC, Mobile PAC and renewals made through inbound telephony. Separate settings determine how the charge policy affects transactions at Polaris ExpressCheck and SIP self-check workstations.

### **Staff Client Transactions**

For staff client transactions, you can optionally display a prompt regarding charges during checkout and renewal as appropriate. You might also consider placing physical labels on your chargeable items so that patrons know there is a charge before they reach the circulation desk.

When a chargeable item is scanned at check-out or selected for renewal, the system first checks for item blocks, holds, and patron item limits. Then, if you have set the system to display a prompt, a Patron check-out charge dialog box is displayed.

The staff member can choose to charge the patron's account and continue the check-out, pay the charge, waive the charge, or cancel the transaction. The appropriate permissions are required to pay or waive the charge. If the staff member chooses to pay the charge, a standard Pay dialog box is displayed. The Charge for Check-out dialog box also appears during bulk check-out of Borrow by Mail or Outreach Services items. If you have chosen not to display the prompt, the charge is automatically applied to the patron account. Check-out charges are not listed on the check-out receipt. If the same item is checked out again to the same patron before the library closes, the patron is not charged again.

If the item's assigned branch has options set to charge for renewals and charge for overdues, the Renew chargeable overdue item dialog box opens when you renew an overdue item.


When a chargeable item is checked out offline, the charge is applied to the patron account and a message is written to the upload log file.

**Note:**

In systems that use floating collections, the chargeable settings for an item change as the item's assigned branch changes.

The Patron Status workform - Account view lists check-out charges. The organization listed with the charge is the item's assigned branch. The charges are also listed on the PAC My Account - Fines & Fees page.

### PAC Display

- Item availability display - The PAC item availability display includes an icon  next to an item if the item's assigned branch has defined the item's material type as chargeable.
- Courtesy message for hold requests - When a patron places a bibliographic-level hold request in PAC, and at least one item eligible to fill the request would incur a check-out charge, a courtesy message is displayed. Note that the request may actually be filled by a non-chargeable item, depending on which items trap for the

request. If after the request is placed new items become available from a branch that does not charge for checkout, or holds policies change, the message may no longer be accurate. It is a courtesy message only. You can edit the message in Polaris Language Editor (WebAdmin):

- For PowerPAC, the default message is **If your request is filled you may be charged to check out the item according to the policy of the library owning the item. Do you want to place this request?** The Polaris Language Editor string ID is **PACML\_CHARGECKOREQ**.
- For Mobile PAC, the default message is **If your request is filled you may be charged to check out the item according to the policy of the library owning the item. Do you want to place this request?** The Polaris Language Editor string ID is **MP\_MSG\_HOLDS\_CHARGE\_WARNING**.

### Renewing Items From PAC

If renewing an item is chargeable according to the settings of the item’s assigned branch, a message is displayed when the patron attempts to renew the item from the patron account. The patron can choose whether to continue or cancel the renewal. The default messages can be edited in Polaris Language Editor (WebAdmin).

PowerPAC String ID	Default Message
PACML_CHARGE_RENEW	There is a charge to renew this item.
PACML_CHARGE_RENEW_MULTIPLE	There is a charge to renew the following items.
PACML_RENEWITEMS_1347	If you renew these items your account will be charged
PACML_RENEWITEMS_1348	To accept these charges and continue with the renewal, press 'OK'.
PACML_	Your account has been charged.

RENEWITEMS_1349	
Mobile PAC String ID	Default Message
MP_MSG_ITEMSOUT_CHECKOUT_CHARGE_WARNING	There is a charge of {0} to renew this item. Your account will be charged. Do you want to accept this charge?
MP_MSG_ITEMSOUT_CHECKOUT_CHARGE	Your account has been charged.

**Phone Renewal**

The Polaris Phone Attendant also supports charges for item renewals, according to the policies of the item’s assigned branch. The patron is notified of any renewal charges and prompted to accept them. If both overdue and renewal charges will be applied, the notification is combined in a single message. If the patron chooses to renew all items at once (option #6), a status message informs the patron that the “renew all” process is underway, since the process may take a few seconds to gather information. In Polaris Language Editor (WebAdmin), the following language strings define these messages:

String ID	Default Message
PA_TEXT_PATREC_RENEWITEMS_CHARGE	Your account will be charged \$%3.2f to renew these items.
PA_TEXT_PATREC_RENEWITEM_CHARGE	Your account will be charged \$%3.2f to renew this item.
PA_TEXT_PATREC_RENEWITEM_OVDANDCHARGES	Overdue and renewal charges will apply. Your account will be charged \$%3.2f.
PA_TEXT_PATREC_RENEW_WAIT	Please wait while we process your renewals.



See also: [Set up charges for checkout and renewal](#)

### Set up charges for checkout and renewal

To set up charges for checkout and renewal:

1. Enable the fee description in Polaris Administration:
  - a. Open the Fee Descriptions policy table for the organization that is setting up check-out or renewal charge policies.
  - b. Set the fee description **Item charge for check-out/renewal** to **Yes**. This setting displays the fee description on views and dialog boxes that list charges on the patron account. The charge transactions are logged with the Fee Description code **-11**. They are included in all Polaris toolbar reports of charge transactions and are available for reporting in Polaris SimplyReports.
  - c. Select **File > Save**.

For more information about working with this table, see [Defining Fee Descriptions](#).

2. Double-click the Patron Services parameter **Check-out: Charge options** to enable the charge and specify the appropriate material types, charge amounts, and patron codes.

The parameter is available at the system, library, and branch levels. To see the patron services parameters list, click the appropriate level- System, Library, Branch.

The Check Out: Charge options dialog box opens.

Check-Out: Charge Options [Community Library (br)]

Retrieved from: Community Library (br)

Enable

Material types and associated charges

Material Type	Charge
<input checked="" type="checkbox"/> Art	\$0.00
<input checked="" type="checkbox"/> Audiobook	\$1.00
<input checked="" type="checkbox"/> Book	\$1.00
<input type="checkbox"/> Book and CD	\$0.00
<input type="checkbox"/> Children's Video	\$0.00
<input type="checkbox"/> eBook	\$0.00
<input type="checkbox"/> Equipment	\$0.00
<input type="checkbox"/> Kellie R-Rated Realia	\$0.00
<input type="checkbox"/> Kellie Rental Manuscript	\$0.00
<input type="checkbox"/> Kellie Rental Score	\$0.00

Select All    \$0.00    Apply    Unselect All

Patron codes to be charged

- CPH Outreach
- CPH Resident
- CPH Retired
- CPH Staff / Board
- Delinquent Borrower
- ILL Agency
- Juvenile
- Juvenile with Restrictions
- New
- New Borrower
- Outreach

Select All    Unselect All

Check-out only   
 Check-out and Renewal   
 Renewal only   
 Prompt in Staff Client

OK    Cancel    Help

3. Select **Enable**.
4. Select a material type to which a check-out charge should be applied.
5. Specify the amount to be charged for the selected material type and click **Apply**.

You can also click several material types or **Select All**, specify a single amount, and click **Apply**.

**Note:**

It is possible to select a material type and leave the amount at \$0.00, or to set an amount for a selected material type and then uncheck that material type. In either case, no charge will be applied.

6. Select the patron codes that should be charged the specified check-out charges. You can also click **Select All**.
7. Select one option for applying charges:
  - **Check-out only** - Apply the charge only at check-out
  - **Check-out and Renewal** - Apply the charge at check-out and again if the item is renewed
  - **Renewal only** - Apply the charge only when the item is renewed
8. If you want a message to appear when a staff member attempts to check out or renew a chargeable item to a patron, select **Prompt in Staff Client**. For this option, the system uses the setting of the transacting workstation's log-on branch.
9. Click **OK**.

**Related Information**

- Polaris ExpressCheck transactions - Your charge policies also apply to checkout and renewal from Polaris ExpressCheck. You can choose to allow the transactions and have the patron's account charged appropriately when the transactions occur, or stop the transactions and display a message. The option is available in the SelfCheck unit parameter **Polaris ExpressCheck: Blocking conditions** (Item Blocks tabbed page). For more information, see the Polaris ExpressCheck Administration Guide.
- SIP Self-Check transactions - Your charge policies also apply to checkout and renewal from SIP self-check units. You can choose to allow checkout and have the patron's account charged appropriately when the transactions occur, allow renewal and have the patron's account charged, automatically charge when the patron chooses to renew all items out, or stop the transactions and display a message. For more information, see [Setting Up SIP Self-Check Circulation](#).

## Managing Collection Agency Services

Your library may contract with a collection agency to encourage patrons to pay their fines or return borrowed items. Delinquent accounts are reported to the collection agency automatically, and the patron records automatically updated, according to settings you make in Polaris Administration.

**Note:**

Innovative Interfaces charges a modest annual site license fee to use the collection agency interface in Polaris. Contact your Site Manager at Innovative Interfaces for additional information.

If your library uses a second collection agency to collect from patron accounts that were not settled with the first agency, see the Patron Service PDF Guide, Profiles Reference, Second Level Collection Agency Management.

See also:

- [Using a Collection Agency](#)
- [Collection Processing Reports](#)

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### Using a Collection Agency

**Note:**

For information about the setup in Polaris Administration, search Polaris help for "Set up collection agency processing."

Collection agencies differ in notification practices and in how repayment is obtained. Some collection agencies, such as Unique Management Services (UMS), manage all collection communications with patrons who have delinquent accounts, but the patrons make all payments directly to the library. For other collection agencies, the library may send a fine notice warning the patron that the account will be turned over to collection. Once the account is turned over, patrons may make payments to the collection agency as well as to the library. Your library's contract with the collection agency determines the cost to the library for collection agency services. To recoup some of these costs, you can set a collection fee on delinquent patron accounts.

Regardless of communication and payment methods, collection agency services rely on the automatic reporting capabilities of Polaris. Polaris automatically transmits a

Submission Report of delinquent patron information and an Update Report of patron account activity to the collection agency, via e-mail, FTP, or both. You can have Polaris send copies of the reports to a library staff member for verification and backup. In addition, a Synchronization Report lists all currently reported patrons with their balances. You can run this report manually, any time.

A patron's account is considered delinquent and is included on the Submission Report when all the following conditions exist:

- The patron owes an amount of money over a library-defined limit.
- The money has been owed longer than a library-specified period of time.
- The specific patron has not been excluded from collection reporting (the **Exclude from collection agency** checkbox is not selected on the Patron Registration work-form - General view).
- The patron code in the patron record has not been excluded from collection reporting.

The total amount reported may include charges of all types, replacement costs, processing fees, and collection fees. Or, you can opt to report patron accounts based only on lost item charges (see [Reporting for Lost Item Charges Only](#)).

Accrued overdue fines that have not yet been charged are not included in the calculation for reporting to a collection agency. See [Calculating and Blocking for Estimated Accrued Fines](#).

The following events occur during collection agency processing:

- After collection agency functions are started, the system identifies delinquent patrons. The Submission Report is produced during overnight batch processing and is sent to the collection agency by e-mail or FTP. The report includes all patron accounts that match the criteria you set in Polaris Administration. See [Collection Processing Reports](#).
- A system-generated collection block and collection fee (if specified) is automatically added to the patron record. Only staff members with the system-level Circulation permission **Override collection agency block: Allow** can override the block.
- The collection agency encourages the patron to settle with the library, or collects money directly from patrons and transmits it to the library.
- The patron pays all participating libraries all the money that is owed, including fines and collection fees incurred after being reported to the collection agency.

When the patron no longer owes money to the reporting libraries, the patron's account is out of collection. (The patron may still owe money to non-participating libraries.) The block is automatically removed from the patron's account, and the patron's account is considered to be out of collection.

**Note:**

If the patron's account is not paid down to \$0.00 at all the participating organizations, the patron's account is still in collection. If the patron's account is paid down to \$0.00 after submission to collection, but the patron incurs a new fine before the Update Report is generated, the patron's account is still in collection.

- The Update Report is generated during overnight batch processing, and is sent to the collection agency by e-mail or FTP. The report includes all patrons who have been identified for collection and have had any activity (payment, waiver, or new charge) at the reporting organization since the last report, either the Submission Report or Update Report, was generated.

**Note:**

You can manually remove a patron's account from collection. For information, search Polaris help for "Remove a patron account from collection. However, the action is not included in any automatic collection agency reports. If a patron's account is manually removed from collection, you must inform the collection agency.

If your library uses a second level of collections with the first agency reporting patron accounts that are still unsettled to the library and the library referring these accounts to a second collection agency, see [Second Collection Agency Management](#).

### **Reporting for Lost Item Charges Only**

Patron accounts can be sent to collection based only on lost item charges (combined replacement and processing fees). No other charges are included when determining if the patron account should be reported. However, if the patron account does qualify for reporting based on lost item fees, the total amount owed, including all charges such as overdue fines or printing, is sent to the agency. Similarly, after a patron account is submitted to the collection agency, all new charges of any type are included in the Update Report, not just lost item fees.

A patron account is sent to collection based on a threshold amount you specify. If you set the “item fees only” option, the calculation to determine if the patron meets the minimum balance for reporting is based only on combined replacement and processing fee charges. For example, if the threshold amount is \$25:

- A patron who owes \$30 in combined replacement cost and processing charges for lost items will be reported to the collection agency. If this patron owes an additional \$10 in overdue fines, making his total owed \$40, when the account is submitted to the agency his amount owed will be \$40, and the account will not be cleared until the balance is \$0.
- A patron who owes \$20 in combined replacement cost and processing charges and \$10 in overdue fines will not be reported.

The “item fees only” option is available only at the system level. If selected, it affects all calculations to determine if a patron account qualifies for reporting, regardless of the **Reporting Level** setting (System, Library, Branch) or **Reporting By** setting (Patron Branch, Item Branch, Loaning Branch). For more information, search the Polaris help for “Set up collection agency processing.”

**Note:**

When you set the “item fees only” option, calculations for new collection agency submissions from that point on will be affected. Patron accounts reported under previous rules are not affected.

**Reporting Minors**

Polaris identifies patrons under the age of 18 from the **Birth date** field in the patron record. You can specify a guardian for collection purposes by setting up a user-defined field (UDF) for the guardian’s patron barcode. See [Setting Up User-Defined Fields](#). In this case, the Submission Report to the collection agency lists the guardian’s address and telephone numbers for collection purposes. If you use library-generated fine notices, the message regarding the minor’s delinquent account is addressed to the minor, in care of the guardian, at the guardian’s address. If the patron’s record does not include a birth date, but does contain a UDF with a valid patron barcode, the patron is reported as a minor. If the system cannot identify the UDF barcode as a patron, the delinquent patron is reported on her own behalf (not as a minor).

**Important:**

Innovative Interfaces sets up user-defined fields at implementation. If you plan to use collection agency services, and you want to specify a UDF to

use for the guardian barcode, you must have Innovative Interfaces set up the UDF.

### Collection Agency Reporting via FTP

You can transmit Submission and Update reports to your collection agency via FTP (File Transfer Protocol), instead of or in addition to e-mail.

FTP is a method of sending data files to (or retrieving them from) specified locations on remote servers. In Polaris Administration, the library specifies the FTP address on the collection agency server. When the process runs, the Submission and Update files are automatically placed on the remote server.

Depending on the collection agency's requirements, the FTP file location for multiple branches may require individual folders for each branch or library, or a single folder containing the data files from all locations. For example, UMS prefers a single folder since the files for individual branches are distinguished by file name.

#### Secure FTP and Third-Party FTP software

Polaris also supports SFTP (Secure FTP), a secure way to transmit the data. If the library chooses to use SFTP, you must install a third-party SFTP program on the library network. You can also use third-party FTP software that does not support SFTP. In either case, you specify the program executable and any associated parameters in Polaris Administration.

**Note:**

Some networks may have restrictions on FTP or on file sizes, and there may be firewall settings that prevent FTP. The library is responsible for clearing the way for FTP on the local network.

#### Active FTP

Some collection agencies may support Active FTP. Active FTP allows the remote service to initiate the connection to begin the transfer. However, the firewall on some networks will not allow this, so Passive mode is used. If the remote server accepts Active FTP, you can select the option in your Polaris Administration setup. As with Passive mode, the remote service will need to provide the parameters necessary to connect via Active FTP.



## E-Mail Summary

The Polaris Administration e-mail setup for collection agency processing includes an option to send an e-mail summary only. When this option is selected, the program sends a summary to the specified e-mail addresses instead of a full report. The summary e-mail includes the summary data normally included in the full report. (This summary data is not included in the FTP files.) The header of the summary includes a mapping of the UDFs included in the files. The summary option should be used in connection with FTP transmission to alert the designated recipients that the reporting process ran.

**Important:**

The e-mail summary option is intended to be used with the FTP option. If the library sends files to the agency via e-mail but does not use FTP, do not select this option.

The e-mail summary feature is also valuable if there are transmission errors. If the FTP transmission fails for any reason, the summary e-mail message indicates that the process failed. The message includes the filename of the document to be sent and a reason for the failure, if one can be determined.

## Sending the Files

When you enable FTP transmission, the Submission and Update reports are automatically sent to the designated file location, and a copy of the report file is automatically saved to a local directory on your server:

**\\[Polaris Data Path]\\[Version No.]\\Logs\\SSIS\\CollectionAgency\\Reports**

If you report by branch or library, each location has a subdirectory:

**SSIS\\CollectionAgency\\Reports\\AMS-3**

**Note:**

If both e-mail and FTP output options are selected, only one copy is sent to the local directory.

## Setting Up FTP Transmission in Polaris Administration

Before you begin setting up FTP transmission in Polaris Administration, contact your collection agency to determine the following:

- FTP server location
- FTP port

- FTP folder name
  - Your user name and password for the agency's FTP server
- 

## Collection Processing Reports

Three reports are created in Polaris and sent to the collection agency. The Submission Report and the Update Report are scheduled to run in overnight batch processing, while the Collection Agency Synchronization Report is run on demand. These reports are ASCII text files that can be imported into Microsoft Excel or another spreadsheet application to format as needed.

**Important:**

Collection Agency reports depend on the SQL Server job **Polaris\_Collection**. Before running reports, in SQL Enterprise Manager, check that the SQL Server job **Polaris\_Collection** is scheduled properly and enabled. The schedule should not interfere with other running jobs.

- Submission Report - Includes all patrons who have been flagged for collection since the last Submission Report was generated. See [Using a Collection Agency](#). These patrons are not included in subsequent Submission reports unless their patron records are cleared, and they qualify at a later time. The report runs in overnight batch processing on a regular schedule and is transmitted to the collection agency automatically. For more information, search Polaris help for "Set up collection agency processing."
- Update Report - Includes all patrons whose accounts are in collection and have had any activity (new charge, payment, or waive) at the reporting organization since the last report (Submission or Update) was generated. The report runs in overnight batch processing on a regular schedule and is transmitted to the collection agency automatically. For more information, search Polaris help for "Set up collection agency processing."

**Important:**

To be sure the system reports the recovery of lost items correctly, set the Patron Services parameter **Overdues: Billed items set to lost** to **Yes**.

- Collection Agency Synchronization Report- Summary of all patrons currently reported to the collection agency. It includes each patron's barcode, name, and the amount due. The Balance Due System is the amount a patron owes to all reporting

organizations, and the Balance Due Org is the amount a patron owes to the reporting library. (If the reporting organization is the system, the amounts are the same.) It is possible that the patron may be reported on behalf of more than one library; for example, if the reporting options are set to Item's Branch. In this case the patron would appear twice in the report, once for each reporting organization, and the Balance Due System is the total amount owed to both organizations. Also, the patron may have an actual account balance greater than the Balance Due System. This would happen if the patron owed additional charges to a third library that did not report to the collection agency. That larger amount, the sum of amounts due to the two reporting libraries and the one that did not report, is not included in the Synchronization Report because it does not impact any collection agency processing. The collection agency may use this report to verify that its records are accurate. You can run this report on demand, at any time. When you run the report, it is automatically transmitted to the collection agency. For more information, search Polaris help for "Generate the Collection Agency Synchronization."

In addition to the three reports intended for the collection agency, formatted reports for library use are available from **Utilities, Reports** on the Polaris Shortcut Bar:

- Collection Agency Summary - Lists all patrons in collection and the amounts they owe.
- Collection Agency Detail - Lists all transactions on accounts submitted to collection within a specified date range.

For more information about running and printing these reports, search Polaris help for "Patron Financial Reports."

## Setting Up Hold and ILL Loan Request Processing

**Note:**

If your library uses INN-Reach, see the INN-Reach Integration - Implementing topic in the Polaris ILS Help.

Staff and patrons (if your library allows patrons to place holds) can create hold requests for titles that are not available at a particular branch, but are owned by other libraries in the system. The hold requests may be filled during Request-to-Fill processing, or when an item that can fill the hold request is trapped at circulation.

You can use Polaris Administration settings to control the following aspects of holds and interlibrary loan (ILL) request processing:

- Holds routing - Each library organization can determine the member libraries in its Requests to Fill (RTF) routing cycle, the routing sequence, and how many days a request remains on a branch's Request-to-Fill list. An organization can set up primary and secondary routing groups and specify the conditions under which requests are routed to the secondary group. See [Holds Routing Overview](#).
- Hold request statuses descriptions - Your library specifies the descriptions that appear wherever hold statuses are displayed in the staff client and PAC. See [Edit hold request status descriptions](#).
- Hold request not-supplied reasons - Your library system defines the possible reasons why libraries may not fill hold requests, and individual branches can select a default reason. When a staff member denies a hold request, she can select one of the defined reasons. See [Add a not-supplied reasons entry](#).
- Hold requests placed from the PAC applications - Your library can specify whether patrons can place hold requests from the PowerPAC, Mobile PAC, and Children's PAC. See [Set Holds options: Enable hold requests by patrons and define restrictions](#).
- Restrictions on item-specific holds - Your library can allow holds at the title level but either prevent item-specific holds or limit them to first available copies of serial items or multi-part sets. See [Set Holds options: Enable hold requests by patrons and define restrictions](#).

**Note:**

Staff members with the appropriate permissions can restrict holds for specific items using settings in the Item Record workflow.

- Trapping preferences and queue settings - Each branch can set a holds trapping preference and queue settings. At the system level, you can set up optional trapping preference groups to apply trapping preferences to a designated group of branches, such as a consortium where various groups of organizations are far apart or have very different hold request policies. Within a trapping preference group, you can prefer the patron's registered branch or the item's assigned branch. See [Set Holds options: Trapping preferences, queue settings](#).
- Patron hold limits - You can block requests based on combinations of specific patron codes, limits on total requests, and limits on requests for specific material types. You can also create groups of material types and place limits on the group as a whole. See [Defining Loan and Request Limit Blocks](#).
- Renewals for items with hold requests - Your library system can prevent renewals for items with hold requests or allow renewals unless the item is the only one eligible to fill a request. See [Allow renewals for items with hold requests](#).
- Hold pickup branches listed in item records - Use the branch-level Polaris Administration patron services parameter **Holds: Item pickup branches** to select the branches that appear in the list of pickup branches. See [Set up the hold pickup branch list](#).
- Branches to exclude from the pickup branch list - You can specify which libraries to exclude as possible pickup libraries in the PAC and in the staff client. See [Set Holds options: Exclude pickup branches](#).
- Specify the hold statuses for which patrons can change the hold pickup location - At the system level only, you can select the hold statuses for which patrons can change the hold pickup location. See [Set hold options: Enable patrons to change the holds pickup branch from the PAC](#).
- Hold request notices - When a hold request is ready for pick-up, a notice informs the patron. Libraries define the mail, e-mail, and phone notification settings. See the Telephony Administration PDF Guide, Delivering Notices by Phone (Outbound Telephony).

**Note:**

Polaris Borrow by Mail is a licensed feature available at no additional cost

that allows staff members and patrons to request library materials and have the requested materials delivered to the patrons by mail. For information about Borrow by Mail request processing, see the Patron Services PDF Guide, Setting Up Borrow by Mail Circulation topic.

**Note:**

Libraries that offer integrated eContent set up request limits and other options with the vendor; many of the features described in this unit do not apply to eContent requests. For details, see the Public Access Administration PDF Guide, Managing Integrated EContent in the PAC.

- Interlibrary loans - See [Setting Up ILL Requests](#).

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## Hold Routing Overview

The Holds Routing Sequences Primary and Holds Routing Sequences Secondary policy tables specify the RTF routing sequences of hold requests from the requester branch to other branches, and determine whose items can be trapped at circulation to fill a request. Your Polaris Implementation Manager helps set up the tables when Polaris is installed, but you can modify them as needed. The Holds Routing Sequences Secondary table can be left empty if the branch does not use a secondary RTF sequence.

You can work with these tables from an organization workflow or with the Administration Explorer. When you open the tables at the system level, you can view, add, change, delete, and reorder entries for any branch. At the library level, you can view, add, change, delete, and reorder entries for any branch associated with the library. At the branch level, you can view, add, change, delete, and reorder entries only for the specific branch.

### **Note:**

These System Administration permissions are required to modify these tables: Access administration: **Allow**, Access tables: **Allow**, Modify holds routing sequence table: **Allow**.

For instructions on setting up the Hold Routing Sequence tables, see [Edit holds routing tables](#). After setting up tables, you use the Request parameter, **Holds options**, **RTF** tab to set the total number of days in the RTF cycle and specify how the requests are filled. See [Set Holds options: RTF processing](#).

### **Request to Fill (RTF) Routing**

In Polaris, the specified pickup branch for a hold request (not the patron's registered branch) is the "requester" branch for the purposes of RTF routing. Each branch can specify the RTF routing sequence that the system uses when that branch is the pickup branch. When you set up a routing sequence for a requester branch, you are effectively defining the branches with which the requester branch can do the business of hold requests, whether items are taken off the shelf as part of RTF processing or trapped at circulation.

A branch can specify a primary routing sequence alone, or both primary and secondary routing sequences. This allows a library to establish levels of priority in filling hold requests. In a system where libraries are geographically close and have fairly uniform lending policies, a branch may define only a primary group of RTF branches, allowing a request to pass from one branch to the other in a preferred order. Leaving a branch out of a routing cycle will prevent your items from filling requests at that branch. You might do this, for example, if a branch has closed temporarily.

If the concern is not just to fill requests from any branch as efficiently as possible but to first check with a specific group of branches (such as geographically close or politically allied branches) the library might place itself and a few other branches in the primary group, but place other libraries in the secondary group. Then a request is routed to the secondary group only if the primary group does not have the item.

**Note:**

You can set Polaris to randomize the request sequence so that the same library is not always the first asked to fill the request.

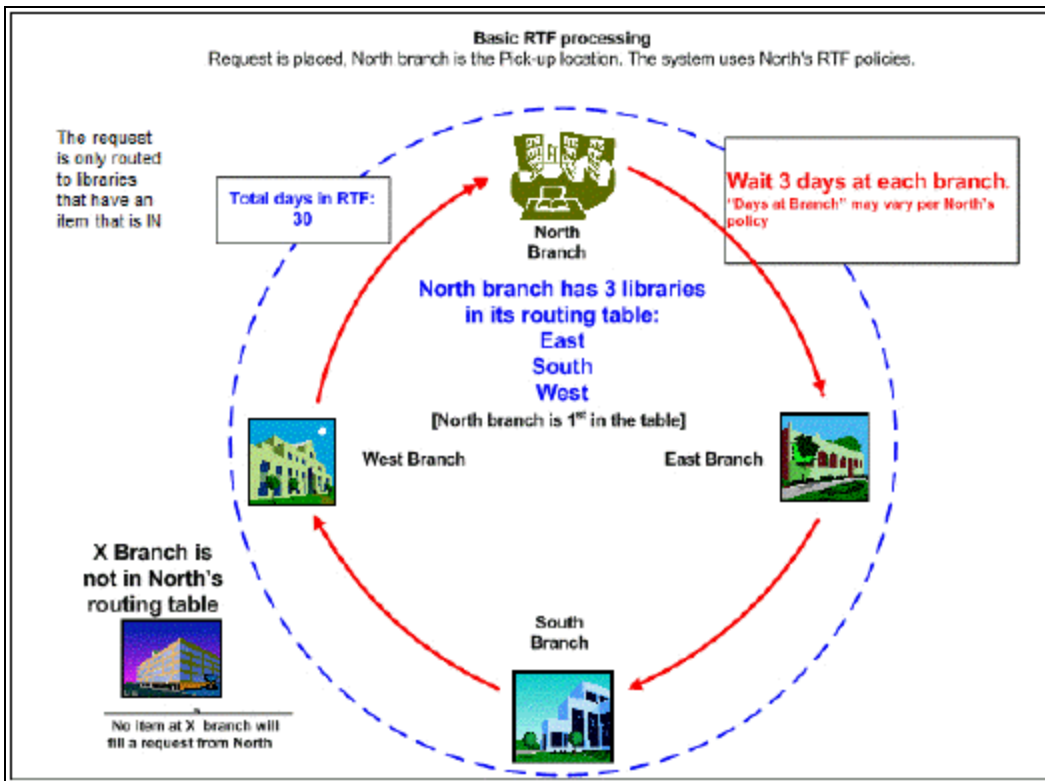
When you use primary and secondary routing groups, and a request is routed to the secondary group, the position of the request in the holds queue may change. If you think this might confuse patrons, you can suppress the display of the holds queue position in PAC and Polaris ExpressCheck. For PAC, set the PAC profile **Patron access: Display hold queue information** to **No**. The profile setting for the patron's registered branch controls whether the holds queue column is displayed in the online patron account, and whether the patron receives a message about the current number of active requests for the material when she places a hold. For Polaris ExpressCheck, open the SelfCheck Unit parameter **Polaris ExpressCheck enable** and clear the **Display hold queue position** checkbox.

**Note:**

It is neither necessary nor desirable to include the same branches in both the primary and secondary cycles as this defeats the purpose of separately defined groups. Also, when a request passes to the secondary routing cycle, an item that checks in to a primary branch will still trap for the request.

The illustration shows an example of primary group routing.





For each branch (and in each routing group, if you use both groups), the following information is defined:

- Requester branch - The branch designated as the pickup branch for the hold request.
- Responder branch - A branch that can fill a hold request for the requester branch. If the responder branch owns an item that fills a request and the item has a status of In, the branch is part of the RTF sequence for that request. If a branch is not listed as a responder branch, the branch cannot fill a hold request from the requester branch, regardless of any items it may have.
- Sequence - The order in which a request is routed to responder branches, one branch at a time. For example, if Responder A has a Sequence setting of **3**, it is the third library to receive a request from the Requester library (assuming that branches with a sequence of **1** and **2** have items that are In, but deny or ignore the request). You can randomize which library should come next to start the sequence, if number **1** denies or ignores the request.

**Important:**

Each branch should put itself in the first position (sequence of 1) for the

Primary table's Responder column. That way, the request can be filled first by the requester branch, if that branch has an item that is In. If the branch is not listed as a responder branch for itself, its own items do not trap for holds at circulation. If you use secondary groups, you would probably not want your branch as a responder branch in the secondary group, since the branch would be polled again if the request went to the secondary group. If a request does go to the secondary RTF group, an item can still be trapped at any branch in either group.

- Days at branch - The number of days a request stays on a branch's RTF list if no one responds to the request. When the period is over, the request moves to the next responder branch in the sequence with an item that is In. Polaris skips days closed and dates closed for the responder branch when calculating this period, so they do not count toward the total days at the branch. Days closed are specified with the Patron Services parameter **Hours of operation**, set at the system, library, or branch level. Dates closed are set in the Dates Closed policy table for an organization. See the Polaris Administration PDF Guide, Identifying Dates Closed.

### Edit Holds Routing Tables

If you use primary and secondary routing sequences, you edit the Holds Routing Sequences Primary and Holds Routing Sequences Secondary tables separately; however, the basic procedure is the same for both tables.

#### Note:

Although it is possible to add the same branch to both the Holds Routing Sequences Primary and Holds Routing Sequences Secondary tables, this might result in the same branch being polled in both RTF cycles.

Secondary routing groups handle RTF routing in "only if not in the primary group" situations, so adding the same branch to both tables would defeat this purpose.

To edit the holds routing policy tables:

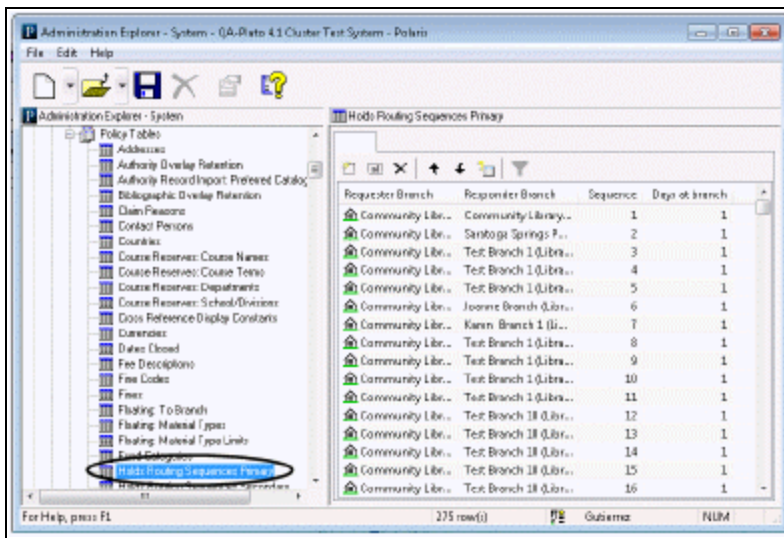
1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Holds Routing Sequences Primary** or **Holds Routing Sequences Secondary**.


#### Note:

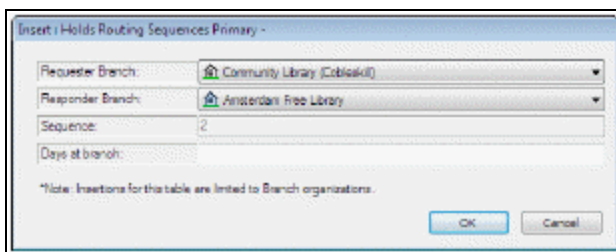
To better manage memory, a program-defined row limit determines

whether these tables can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Hold Routing Sequences table is displayed in the details view.



2. Click  to display the Insert Holds Routing Sequences dialog box.



3. In the **Requester Branch** list, select the branch to which the holds routing entry is being assigned.

**Note:**

If the Holds Routing Sequences table is opened at the branch level, only the branch name is displayed in the **Requester Branch** list.

4. In the **Responder Branch** list, select the branch to which you want to send hold requests.

**Note:**

If all the branches in the system are already in the table, the **Responder Branch** box is unavailable, because you cannot add a duplicate entry to the table.



You can add any or all branches as responder branches. If you do not exchange requested materials with one or more branches in the system, do not add these branches to the table. A responder branch may be included in the Holds Routing Sequences table for one library, but not another. For example, Branch A may include Branches C and D as responder branches, but not Branch B. However, Branch B may include Branches A, C, and D.

**Important:**

When defining the routing cycles for your branch (you are the requester) your branch will normally be the first branch in the sequence. This insures that requests always come to you first. Omitting a branch from the sequence means that this branch will never fill hold requests, a branch that is a processing center is an example of this. However, if you use both a primary and a secondary routing group, add your branch to only one cycle. It is not necessary to include a branch in both cycles.

5. In the **Days at branch** box, type the number of days a request should stay on the RTF list for the responder branch when the branch does not fill or deny the request.
6. Click **OK** on the dialog box. The Holds Routing Sequences table appears with the new requester branch/responder branch entry. The status bar indicates that the modification is pending.

To position the responder branch in the holds routing sequence, select the responder branch, and click the arrow buttons:

- Click  to move the branch earlier in the sequence.
- Click  to move the branch later in the sequence.

**Important:**



Each requester branch should put itself as a responder branch in the first position (Sequence of 1).



The value in the **Sequence** column changes as you reposition the entry.

7. Select **File > Save** to save your changes. The status bar indicates that the record is saved.
8. Set the Request parameter **Holds options**, if you have not already done so.

Several **Holds options** settings affect the RTF cycle.

## Related Information

- Modify a table entry - Select the entry and click . You can change the **Days at branch** setting for an existing holds routing entry. If you need to change the holds routing entry to another responder branch, delete the incorrect entry and insert a new holds routing entry.
- Delete a table entry - Select the entry and click .
- Reorder the holds routing sequence - To change the order in which a hold request is routed, change the position of the responder branch in the routing sequence.

Select the responder branch entry, and click  to move it earlier in the sequence, or click  to move it later in the sequence.

- Request history - You can see a request's status as it passes from branch to branch in the request-to-fill cycle. On the Hold Request workflow in the staff client, select **View, Notes**. Request history information is located at the bottom of the Notes view. Each time the request passes to a different branch, the status is displayed as Pending. For more information about working with requests in the staff client, see the Patron Services PDF Guide, Placing Hold Requests.

**Set Holds Options: RTF Processing**

To set options related to requests-to-fill (RTF) processing:

**Note:**

For more information on holds routing and setting up primary and secondary RTF routes, see [Edit holds routing tables](#).

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**. The Hold Options dialog box - Requests tabbed page appears.
3. Click the **RTF** tab.

4. Select **Allow only one cycle in Primary RTF** to send requests through the RTF cycle only once when all libraries in the requester branch's primary routing table deny or ignore the request.

When this option is checked and you use only one routing sequence, at the end, the request status becomes Active and the item can be trapped at circulation, but the request no longer appears on the responder libraries' RTF lists. If you use a primary and secondary routing sequence, the request goes to the secondary routing sequence at the end of the cycle.

5. (For libraries that use secondary routing sequences.) Select the **Allow only one cycle in Secondary RTF** sequence to send requests through the secondary RTF cycle only once when all libraries in the requester branch's secondary routing table deny or ignore the request.

When this option is checked, at the end of the secondary routing cycle, the request status becomes Active, and the item can be trapped at circulation at any branch, but the request no longer appears on the libraries' RTF lists.

**Note:** When a request is routed to the secondary cycle, items will still trap if checked in at a primary cycle branch.

6. Select **Randomize Primary RTF** to have the system randomly select which library in the primary RTF sequence is the next library to get the request when the first branch in the sequence denies or ignores the request. After Polaris selects the next library, the sequence is followed in order.

You might select this option to prevent the same library from repeatedly filling the requester branch's requests.

7. (For libraries that use secondary routing sequences.) Select **Randomize Secondary RTF** to have the system randomly select which library in the secondary RTF sequence is the next library to get the request when the first branch in the specified start sequence denies or ignores the request. This option works like **Randomize Primary RTF** (above), but it applies to the secondary routing sequence.
8. (For libraries that use secondary routing sequences.) Select **When no items in Primary RTF transfer immediately** to send a request immediately to the secondary routing sequence when no items are in at any of the responder branches in the primary routing sequence. If this option is not selected (do not transfer immediately), if all items are out, are holdable, or otherwise not restricted from filling requests, the request remains in the primary cycle for the period of time you set in **Total Days in Primary RTF cycle**. However, if all remaining items are somehow restricted from filling requests—for example, if they are not holdable or they have a request such as Lost and items with that status have been restricted from filling requests—the request will move to the secondary because there are no items that can fill the request in the primary.
9. In the **Total Days in Primary RTF cycle** box, type the number of days a hold request continues to follow the sequence of responder branches designated in the Holds Routing Sequences Primary policy table (see Setting Up Holds Routing).

If you use a single routing sequence, when this time period is over, the request can still be filled when an item is trapped at circulation, but it is no longer routed to the branches. If you use both primary and secondary routing sequences and you have not selected **transfer immediately** (see step 8), the request remains Active in the primary cycle for this number of days before going to the secondary routing sequence.
10. (For libraries that use secondary routing sequences.) In the **Total Days in Secondary RTF cycle** box, type the number of days a hold request continues to follow the sequence of responder branches, as designated in the Holds Routing Sequences Secondary policy table.

When this time period is over, the request can still be filled when an item is trapped at circulation, but it is no longer routed to the branches.

11. **(System level only.)** In the **Default not-supplied reason** box, select the default reason that is displayed when a library denies a hold request.

Your choices for this setting are defined in the User Defined Hold Not Supplied Reasons policy table. See Defining Not-Supplied Reasons.

12. Select **If all material limits are exceeded set to Not Supplied** to display a block message in the staff client when all the items attached to the bibliographic record have the same material type and a patron has reached the hold limit by material type. The system uses the setting of the governing library for patron blocks.

If the block is overridden, the request is placed with a status of Not Supplied. The Not Supplied reason is **All items denied by system**. If some items have the limited material type and some do not, a message is displayed and those of the limited material type are automatically denied by the system.

If this option is not checked, and all the items attached to the bibliographic record have the same material type, the block message is displayed in the staff client as above. However, if the block is overridden, the request is placed with a status of Active. If some items have the limited material type and some do not, a message is displayed and those of the limited material type are automatically denied by the system.

13. To specify the length of time that a request can remain in a Located status before it reverts to Pending, select the **Time out Located status** box, and type or select the number of hours (1-99).

**Note:**

The Located status can be assigned only through the Polaris Leap Picklist. It indicates that an item was found to fill a request but has not been checked in to trap. If a time out period has been set for the Pickup library, requests that remain in a Located status for the specified time period revert to a status of Pending.

14. To stop all RTF processing, select **Stop RTF processing**.

**Note:**

When RTF processing is stopped, ILL requests submitted via INN-Reach



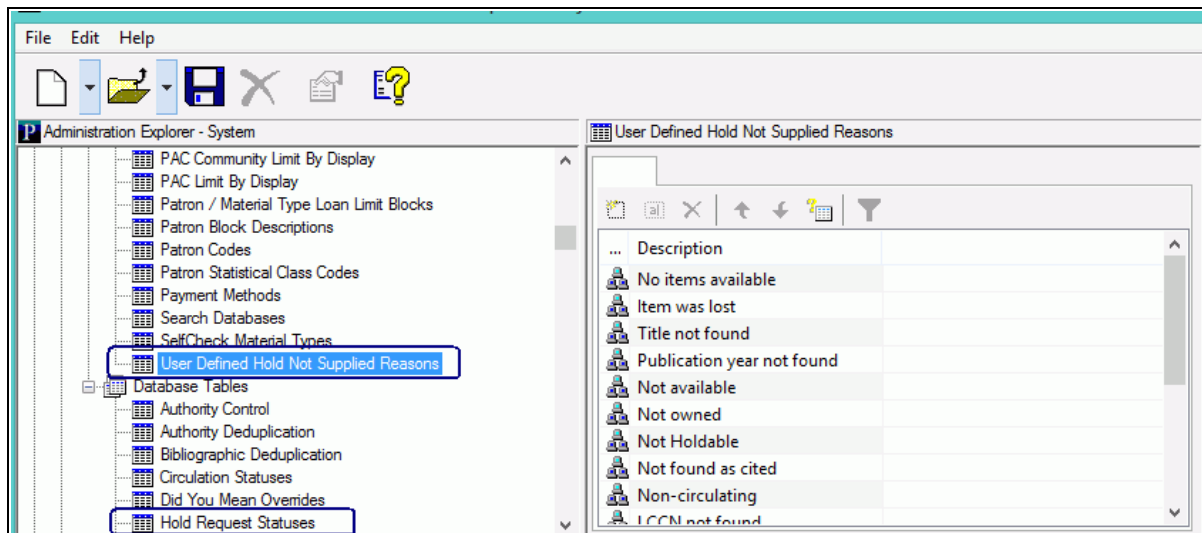
are not processed. Items will still trap for holds if they are manually checked in.

15. Click **Apply** to save your settings and continue to work with holds options, or click **OK** to save your settings and close the Hold options dialog box.

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## Defining Hold Statuses and Hold Not Supplied Reasons

The descriptions for hold statuses are defined using the Hold Request Statuses database table, and the possible reasons for denying a hold request are defined using the User Defined Hold Not Supplied Reasons policy table. To access these tables, go to the Administration Explorer tree view, open the Policy Tables or Database Tables folder, and select the table. The table is displayed in the details frame.



See also:

- [Edit hold request status descriptions](#)
- [Add a not-supplied reasons entry](#)

### Edit hold request status descriptions

As a hold request moves through the processing cycle, the request status changes. The status descriptions are displayed in various contexts in the staff client, in the PAC patron account, and in Polaris ExpressCheck. The standard hold status descriptions are as follows:

**Active** - When a hold request is placed in the queue, its status is automatically set to Active. All items that can fill the hold request are bound to it, and the items can be trapped to fill the request. The system is actively looking for items to fill the request.

**Cancelled** - Cancelled hold requests remain in the database and visible on Polaris workforms. A Cancelled request cannot be filled. However, you can reactivate or delete it.

**Expired** - If a hold request is not filled within the specified period of time, the request status automatically changes to Expired. (The current date is later than the Expiration date on the Hold Request workform.) An Expired request cannot be filled. However, you can reactivate or delete the request, or convert it to an interlibrary loan request.

**Held** - A Held request means an item has been trapped to fill the request, and the circulation status is Held. The item is ready for the patron to pick up.

**Inactive** - An Inactive hold request has an activation date in the future. The request does not appear in the queue, and an item cannot be trapped to fill the request until the activation date. You can cancel or delete an inactive request, or convert it to an interlibrary loan request.

**Not-supplied** - If no items can fill the request (for example, if no items are attached to the bibliographic record), the request status is Not-supplied. You can delete the request or convert it to an interlibrary loan request. You can also reactivate a Not-supplied request, but if the reason it was not supplied has not changed, the request becomes Not-supplied again.

**Out** - An item has been linked to the hold request, and the item's circulation status has changed to Out (that is, the item has been checked out). This status is useful in keeping track of items requested and circulated by Borrow by Mail.

**Note:**

This status is automatically enabled for organizations using Borrow by Mail and is displayed in the staff client and the PAC patron account (where it appears as **Sent**). Organizations who do not use Borrow by Mail can choose to display or suppress the display of requests with the status of Out. On the Holds options dialog box - Staff & PAC tabbed page (**Request** parameters), select the option **Display request status "Out"**. The setting for the workstation's logon branch controls the display in the staff client, while the setting for the patron's registered branch controls the display in the PAC patron account.

**Pending** - When an active request can be filled by an item with a status of In at your library, or the request has been routed to another library that has the item with a status of In, the status changes to Pending. If none of the items there have a status of In, the request keeps its Active status, and items can be trapped to fill the request.

**Shipped** - A Shipped hold request means that an item was trapped at a branch other than the pickup branch, and is being shipped to the pickup branch.


**Unclaimed** - If the requesting patron does not pick up the held item within the specified period of time, the hold request status automatically changes from Held to Unclaimed. (The current date is later than the Unclaimed date on the Hold Request workform.)

To edit the display descriptions for hold request statuses:

**Note:**

These System Administration permissions are required to view and modify this table: **Access administration: Allow; Access tables: Allow; Modify hold status table: Allow.**

1. In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Hold Request Statuses**. The Hold Request Statuses table is displayed in the details view.
2. To modify a description, follow these steps:

- a. Select the hold request status entry and click . The Modify Hold Request Statuses dialog box appears.
- b. Type the new description in the **Description** box.

Modify the description so that it is brief and understandable to everyone, including patrons. The modification affects only the description that is displayed; it remains associated with the underlying hold request status that appears in the **Name** box. Reports use the status name, not the description.

- c. Click **OK**.

Related Information

- Processing hold requests (staff client) - See the Patron Services PDF Guide, Working with Interlibrary Loans.
- Deleting bibliographic or item records with linked hold requests - Two system-level Cataloging parameters control whether a bibliographic or item record can be deleted when there are hold requests attached to it:

- Bibliographic record delete: Allow if there are holds - The default setting is **No** (do not allow bibliographic record deletion if hold requests are attached). When this option is set to **Yes**, if the record is linked to one or more hold requests with a status of Active, Pending, or Inactive, and no other circumstances prevent the deletion, the deletion is allowed and the request status is set to Not Supplied. A canceled hold notice is generated according to your library's settings for this type of notice. Regardless of your setting for this parameter, the deletion will be allowed and the request deleted if the request has a status of Not-supplied, canceled, Expired, or Out. The deletion will not be allowed if the request status is Unclaimed, Shipped, Held.
- Item record delete: Allow if there are holds - The default setting is **No** (do not allow item record deletion if hold requests are attached). When this option is set to **Yes**, if the record is linked to one or more bibliographic-level or item-level hold requests with a status of Active, Pending, or Inactive, and no other circumstances prevent the deletion, the deletion is allowed and the request status is set to Not Supplied. A canceled hold notice is generated according to your library's settings for this type of notice. As with the bibliographic record parameter, the deletion will be allowed and the request deleted if the request has a status of Not-supplied, Canceled, Expired, or Out. The deletion will not be allowed if the request status is Unclaimed, Shipped, Held.

### Add a Hold Not Supplied Reason to the Policy Table

You define the reasons that a hold request was not supplied in the **User Defined Hold Not-Supplied Reasons** policy table. The same entries are displayed for every organization level at which the table is opened. You can add entries to the table at the system, library, and branch levels, but the addition is applied to all organizations. All organizations should agree on the not-supplied reasons they use for their hold requests. You cannot delete or modify entries in this table.

You can open the User Defined Hold Not-Supplied Reasons table from the Administration Explorer only. You cannot access this table from an organization workflow.

**Note:**

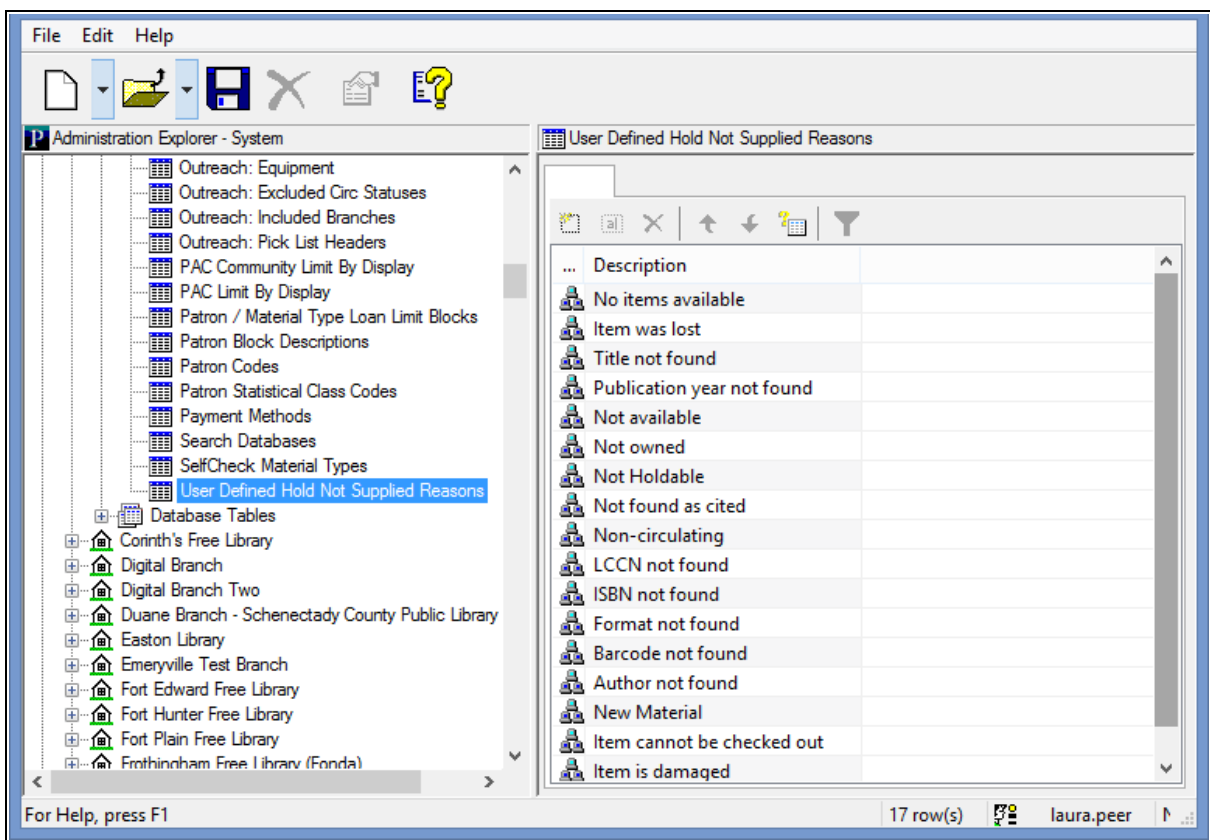
These System Administration permissions are required to add rows to the table: **Access administration: Allow, Access tables: Allow.**

To add a not-supplied reason to the User Defined Hold Not-Supplied Reasons policy table:

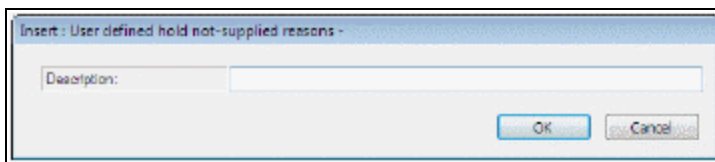
**Important:**

New not-supplied reasons are available to all organizations.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **User Defined Hold Not-Supplied Reasons**. The table is displayed in the details view.



2. Click  to display the Insert User defined hold not-supplied reasons dialog box.



3. Type the text describing the not-supplied reason in the **Description** box.
4. Click **OK** in the dialog box. The User Defined Hold Not-Supplied Reasons policy table is displayed with the new entry. The status bar indicates that the modification is pending.
5. Select **File > Save** to save your changes.

***Related Information***

- Default not-supplied reason - You can set a default not-supplied reason, choosing from the reasons defined in the User Defined Hold Not-Supplied Reasons policy table. See [Set Holds options: RTF processing](#).
- Non-holdable item checked out to requesting patron - When a non-holdable item is checked out to a patron who has a title-level hold request that the item would otherwise fill, the hold request (Active or Inactive) is deleted. "Non-holdable items" include any item that is prevented from binding to the request. For example, such items include those where the **Holdable** option is not checked in the item record, or other item settings related to holds prevent the item from being trapped; the item is restricted by status, such as Lost; the item's assigned branch is not in the routing table.

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## Managing Hold Requests

Use the Request parameter, **Hold options**, to specify how your library organization manages holds. In the Administration Explorer tree view, open the **Parameters** folder for the System, and click the **Request** tab in the details view. Then, double-click **Holds options** to open the Hold Options dialog box.

See also:

- [Set Holds options: Charge for hold requests](#)
- [Set Holds options: Expiration and Unclaim limits, Deletion options](#)
- [Set Holds options: Enabling, Item Status Restrictions, First Available Copy](#)
- [Set Holds options: Exclude pickup branches](#)
- [Set Holds options: Enable patrons to change the holds pickup branch from the PAC](#)
- [Set Holds options: Preferred borrowers branches](#)
- [Set Holds options: Alerts and blocks](#)
- [Set Holds options: Trapping preferences, queue settings](#)

To allow renewals when an item is out to a patron but there are hold requests with certain statuses, the renewal is blocked by default. You can change the setting to allow renewals of these items as long as the item is not the only one available to fill the request. See [Allow renewals for items with hold requests](#).

To prevent holds from being placed on a specific item, see [Restrict holds on specific items](#).

To allow patrons to place multiple holds at once from Polaris PowerPAC working or saved title lists, see the Public Access Administration PDF Guide, Bulk Hold Requests from Polaris PowerPAC Title Lists.

### **Set Holds options: Charge for hold requests**

You can choose to charge patrons for hold requests if they are filled. This setting is available at the System level only, and your settings apply to all organizations in the system.



To set up charges for hold requests:

**Important:**

If you choose to charge fees for hold requests, and you want the charge to apply to hold requests from Polaris PowerPAC Children's Edition, set the Children's PAC profile **Allow hold requests if charging for holds** to **Yes**. The profile is available at the system, library, and branch levels; the default setting is **No**. If you choose to charge a fee for hold requests and you leave the Children's PAC profile set to **No**, hold requests cannot be placed in Polaris PowerPAC Children's Edition.

1. In the Administration Explorer tree view, open the **Parameters** folder for the System, and click the **Request** tab in the details view.
2. Double-click **Holds options**. The Hold Options dialog box - Requests tabbed page appears.
3. Click the **Charges** tab.

The screenshot shows the 'Hold options' dialog box with the 'Charges' tab selected. The 'Charge' checkbox is checked. The 'Rate' field is set to '\$3.50'. The 'Message' text area contains the text: 'Your account will be charged \$3.50 at the time the request is filled.' At the bottom of the dialog, there are four buttons: 'OK', 'Cancel', 'Apply', and 'Help'.

4. Select the **Charge** checkbox.
5. Type the fee per request in the **Rate** box. This amount is automatically added to the patron's account when the hold request is filled.
6. In the **Message** box, type the text that patrons see when they attempt to place a hold request in Polaris PowerPAC. This message should state that a fee will be charged to the patron account when the hold request is filled.
7. Click **Apply** to save your settings and continue to work with holds options settings, or click **OK** to save your settings and close the Holds options dialog box.

### Set Holds options: Define terms and limits

This group of settings controls how long a requested item's status remains held for pickup, how long a hold request remains in the queue without being filled, when the system deletes hold request records, how to handle unclaimed requests, and whether to include Held and Shipped requests in limit calculations.

To set terms and limit calculations:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**. The Hold Options dialog box opens.
3. Click the **Terms** tab.

4. In the **Number days held for pickup** box, type the number of days an item is held for a patron.

The hold request status becomes unclaimed at 11:59 pm on the last day the item is held. The system takes into account the dates closed and hours of operation (days closed) when calculating the last day the item is held. The pick-up branch's setting is used.

5. In the **Default expiration period** box, type the number of days that a hold request remains in the queue before the request status automatically changes to expired.

When a request has expired, it can no longer be filled. The pick-up branch's setting is used.

6. (System level only) Specify when the system deletes expired, canceled, and not-supplied hold request records:
  - **Delete expired in** - The number of days after which an expired hold request is automatically deleted from Polaris. To delete requests immediately upon their expiration, set this to **0** days.
  - **Delete canceled in** - The number of days after which a canceled hold request is automatically deleted from Polaris. To delete requests immediately upon their cancellation, set this to **0** days.
  - **Delete not-supplied in** - The number of days after which a hold request with a not-supplied status is automatically deleted from Polaris. To delete requests immediately when they become not supplied, set this to **0** days.
7. For **Unclaimed requests**, select one of the following options for handling unclaimed requests:
  - **Delete** - An unclaimed request is automatically deleted when the item is checked in or out. Deleted requests are automatically removed from the system. This setting also applies to SIP self-check units.
  - **Cancel** - An unclaimed request is automatically canceled when the item is checked in. A canceled request remains in the system, so it can later be reactivated or deleted.
8. (System level only) To include requests with a status of Held and Shipped when calculating the total number of hold requests a patron can have and the request limit by material types, select **Total holds thresholds include held/shipped**.  
 If you leave this option unchecked, calculations include requests with a status of Active, Inactive, and Pending only. For information about setting total request limits and request limits by material type, see [Defining Loan and Request Limit Blocks](#).
9. (System level only) To specify that inactive requests are counted toward a patron's total number of allowed hold requests, select **Total holds thresholds include Inactive**. For more information about request limits, see [Defining Loan and Request Limit Blocks](#).

10. Click **Apply** to save your settings and continue to work with holds options, or click **OK** to save your settings and close the Holds options dialog box.

***Related Information***

**Hold request status definitions** - See [Edit hold request status descriptions](#).

## Set Holds Options: Enable Hold Requests by Patrons and Define Restrictions

To define hold request processing options for PAC, item-level, and first available copy requests, and to set restricted item statuses:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**. The Hold Options dialog box - Requests tabbed page appears.

Hold options [ QA-INIGO 7.5 (sys) ]

Requests Charges Preferred Pickup Pickup Area Staff client & PAC Terms RTF Queue

Enable title-level hold requests from PowerPAC and Mobile PAC  
Default pickup branch: Test Branch 16 (Library 4)

Enable one-click requests in PowerPAC

Enable title-level hold requests from Children's PAC  
Default: pickup branch: (None)

Manage item requests

Do not allow item requests from PAC

Allow item requests from PAC

Limit item requests to first available copy

Allow requests on integrated serials in PAC and Staff Client

Allow requests on multi-part sets and non-integrated serials in PAC and Staff Client

All

Prevent on statuses

<input type="checkbox"/> In	<input checked="" type="checkbox"/> Bindery	<input checked="" type="checkbox"/> Claim returned	<input type="checkbox"/> In-repair	<input checked="" type="checkbox"/> Missing	<input type="checkbox"/> Unavailable
<input type="checkbox"/> On-order	<input checked="" type="checkbox"/> Claim never had	<input type="checkbox"/> In-process	<input checked="" type="checkbox"/> Lost	<input checked="" type="checkbox"/> Routed	<input checked="" type="checkbox"/> Withdrawn
	<input type="checkbox"/> Claim missing parts				

OK Cancel Apply Help

3. If applicable, set Polaris PowerPAC and Mobile PAC title-level hold request options:
  - **Enable title level hold requests from PowerPAC and Mobile PAC** - Select this box to allow hold requests from Polaris PowerPAC and Mobile PAC. If this option is not checked, patrons cannot place title-level requests in either application.
  - **Default pickup branch** - Select the default location for patrons to pick up their held items. This option sets the default only. A patron can select a different location when placing a request from among those you have

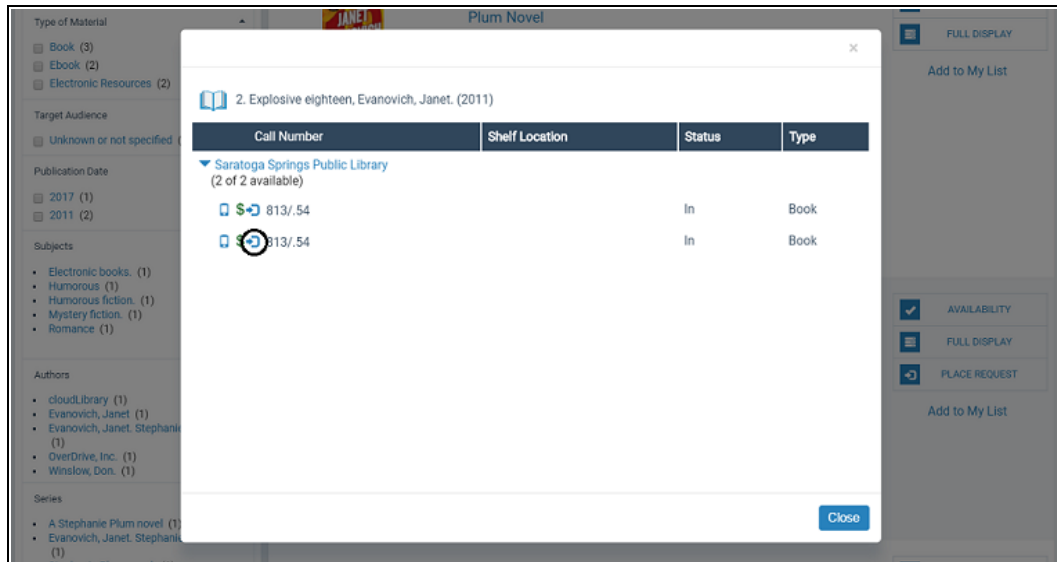
designated as pickup libraries. See [Set Holds options: Pickup library options](#). When the default setting is **None** and the patron selects a pickup branch the first time, or changes the current setting, a message offers to use the selected location until it is changed again. The patron can choose to use the new setting or keep the old one. (The patron can change the setting at any time.) The system uses the setting for the patron's registered branch.

**Note:**

You can completely suppress request and availability information options from PowerPAC and Mobile PAC search results for specific types of material. See the Public Access Administration PDF Guide, Suppressing Request and Availability Options topic.

- **Enable one-click requests in PowerPAC** - Select this option to enable one-click hold requests from PowerPAC. When this option is selected, logged in patrons can place requests by clicking on the **ONE CLICK REQUEST** button.
4. If applicable, set Polaris PowerPAC Children's Edition title-level hold request options:
- **Enable title level hold requests from Children's PAC** - Select this box to allow hold requests from Polaris PowerPAC. If this option is not checked, patrons cannot place title-level requests in Polaris PowerPAC Children's Edition.
  - **Default pickup branch** - Select the location for patrons to pick up their held items. In Polaris PowerPAC Children's Edition, patrons cannot select a different location when placing a request. Be sure the location you select is allowed as a pickup library for this organization, and do not set the default to **None**. See [Set Holds options: Pickup library options](#). The system uses the setting for the patron's registered branch.
5. Select an option under **Manage item requests** to set your policies for item-level requests on monographic materials, specific issues of serial titles, and specific parts of multi-part titles:
- **Do not allow item requests from PAC** - When this option is selected, the item-level request icon never appears in PAC search results. Patrons cannot place any monographic item-level, serial issue, or part-level requests.
  - **Allow item requests from PAC (default)** - When this option is selected, the item-level request icon appears in the availability view of PAC search results

for all item records that have not been restricted from filling holds, and patrons can place requests on specific items. The illustration shows a sample PAC display.



- **Limit item requests to first available copy** - Select this option to allow hold requests on specific issues of integrated serial titles, specific issues of non-integrated serial titles, specific parts of multi-part sets, or all three, but you do not want to allow any other item-level requests. Then, select one of the following sub-options:
  - **Allow requests on integrated serials in PAC and Staff Client** - Select this option to allow item-specific requests on an issue of an integrated serial or standing order part (such as an issue of Wired or a volume of Fodors) and prevent title-level requests on these same titles (preventing patrons from accidentally requesting any issue of Time). See [First Available Copy Requests on Serials](#).
  - **Allow requests on multi-part sets and non-integrated serials in PAC and Staff Client** - Select this option to allow patrons to request the first available copy of a non-integrated serial or multi-part set. See [First Available Copy Requests on Multi-Part Sets and Non-Integrated Serials](#).

**Note:**

If your library uses enriched EDI ordering, see [Holds for On-Order Multi-Volume Sets](#).

- **All** - Select this option to allow item- or volume-specific requests on integrated serial issues, non-integrated serial issues, and multi-part sets.

**Note:**

Regardless of how your item request options are set, if you have enabled title-level requests in the PAC, the title-level **Request** option is displayed. When a patron selects this option, the system directs the patron to place a request at the item level if appropriate (as for Time Magazine). If your settings prevent item-specific or first-available-copy requests, the option to request is only available at the title level.

6. To prevent items with specific statuses from filling hold requests, select the appropriate checkboxes for the statuses.

If an item that could otherwise fill a hold request has a circulation status that you have designated as ineligible (such as Missing), the item is ineligible to fill requests when hold requests are placed and requests are routed. However, the item can be trapped for a hold at check in.

**Tip:**

You can also restrict specific items from filling hold requests according to various conditions. See [Restrict holds on specific items](#).

If you specify that items with the status of In should not fill hold requests, the staff client user receives a warning message if any item is In at the pickup branch. (Items with a status of In at other branches do not block the request.) The staff user can override the warning and continue to place the hold request, but requests from PAC are blocked.

Items with a status of Provisional or Deleted are automatically filtered from holds processing.

7. Click **Apply** to save your settings and continue to work with holds options settings, or click **OK** to save your settings and close the Holds options dialog box.



## Related Information

You can allow patrons to place multiple hold requests at once from their working or saved title lists in Polaris PowerPAC. See the [Public\\_Access\\_Administration PDF Guide](#), [Bulk Hold Requests from Polaris PowerPAC Title Lists](#).

## First Available Copy Requests on Integrated Serials

When requests are allowed for integrated serials, and a patron clicks **Place Request** at the title level, a message directs the patron to select individual issues. However, a staff member can place an item-specific request for a monographic title, and the staff member can place a first-available-copy request for an issue or standing order part.

If the item record meets the following criteria, Polaris treats the request as a first available copy request:

- The Item record is linked to a Serial Issue Record
- The Item record is holdable
- The Item record has data in the **Issue** field

The MARC Bibliographic level entry may or may not be **S**. If there are other items with matching **Issue** data linked to the same bibliographic record, these are also eligible to fill the request.

**Tip:**

When Polaris considers if **Issue** data matches, it tries to match internal spaces and all punctuation, but doesn't consider letter case and beginning and trailing spaces.

If the item is linked to a bibliographic record with the Bibliographic level entry **S**, but there are no linked Serial Issue Records, the request can be filled by that specific item only – the equivalent of an item-level request on a monographic title. The first-available-copy functionality is not available when you do all of the following:

- select **Allow requests on integrated serials in PAC and Staff Client**
- do not use the Polaris Serials subsystem
- manually enter volume data in the call number of the item.

However, if you want to make first-available-copy functionality available in this situation, you can select **All** or **Allow requests on multi-part sets and non-integrated serials in PAC and Staff Client**. See [First Available Copy Requests on Multi-Part Sets and Non-Integrated Serials](#).

**Note:**

Libraries that don't use the Serials subsystem and don't want to select **Allow requests on multi-part sets and non-integrated serials in PAC and Staff Client** can allow individual item requests by setting up each specific issue with an item record. Or, they can use the grouped request functionality in the staff client (see the Patron Services PDF Guide, Grouping a Patron's Hold Requests. ).

See also:

- [Set Holds Options: Enable Hold Requests by Patrons and Define Restrictions](#)
- [First Available Copy Requests on Multi-Part Sets and Non-Integrated Serials](#)

### First Available Copy Requests on Multi-Part Sets and Non-Integrated Serials

When you select **Allow requests on multi-part sets and non-integrated serials in PAC and Staff Client**, you allow requests on volumes of multi-part bibliographic items and serials not cataloged in the Polaris serials module (non-integrated serials). Select this option if the following is true of your library:

- you don't use the Polaris Serials Module
- you want to allow requests on multi-part sets and non-integrated serials
- you want to suppress item-level requests on plain monographs

See also:

- [Set Holds Options: Enable Hold Requests by Patrons and Define Restrictions](#)
- [First Available Copy Requests on Integrated Serials](#)

#### Multi-Part Sets and Non-Integrated Serials

If you select **Allow requests on multi-part sets and non-integrated serials<sup>1</sup> in PAC and Staff Client**, the system does the following when patrons or staff request a hold:

---

<sup>1</sup>A non-integrated serial is an item that is linked to a bibliographic record with a MARC bibliographic level entry of S , but is not linked to a Serial Issue Record created through the Polaris Serials Module.

1. Checks if the MARC Bibliographic level entry is **S**.
  - If yes and there is no integrated serial issue record, the request is treated as a first available copy request. The system presents a dialog for patron or staff to select a designation for the serial they want, and then places the hold.
  - If no, it moves on to the next step.
2. Checks if the item has an attached volume.
  - If yes, it presents a dialog for patron or staff to select a volume of the multi-part set that they want, and then places a volume-level hold. If there are other items with matching volume data linked to the same bibliographic record, these are also eligible to fill the request.
  - If no, it moves on to the next step.
3. Places a title-level hold.

**Note:**

A request on an item with blank Vol data is placed as a single, item-level request.

## Examples

## In PAC:

- For monographic titles like *Harry Potter and the Deathly Hallows*, the request option is available at the title-level only.
- For multiple copies of each season of *The Sopranos* linked to one bibliographic record, a patron can select the request icon at the item level. Selecting the item-level request icon for Season One automatically links the request to all copies of Season One.

## In Staff Client:

- For monographic titles like *Harry Potter and the Deathly Hallows*, a staff member can select the request option at the title-level
- For a monographic title, a staff member can also place an item-specific request.
- For Season One of *The Sopranos*, a staff member can place a first-available-copy request.

Because manually inputted **Vol** data could be inconsistent in your database, you might want to use item bulk change to help ensure uniformity of your existing data before implementing the first available copy option for multi-part sets and non-integrated serials.

**Tips:**

If you plan to make the **Vol** data consistent before implementing this feature, keep in mind that request processing uses exact, character-for-character matches as follows:

- Internal spaces and all punctuation affect a match:  
**Vol 1** and **Vol1** do not match.  
**Vol.1** and **Vol1** do not match
- Case does not matter:  
**Vol.1** and **vol.1** match.
- Beginning and trailing spaces are ignored:  
**[space] v.1** and **[no space] v.1** match  
**v.1 [space]** and **v.1 [no space]** match

### Holds for on-order multi-volume sets

Libraries that use enriched EDI ordering through Polaris Acquisitions and receive shelf-ready items from their vendors can automatically provide patrons with the first volume of a multi-volume set when the set arrives. When the patron places a hold on a new multi-volume set, such as on a television series just released on DVD, the hold is placed at the bibliographic level for the series title. Then, when the full bibliographic record is imported, the embedded holdings create the shelf-ready item records for all the volumes in the series, and the hold is automatically placed on the first volume.

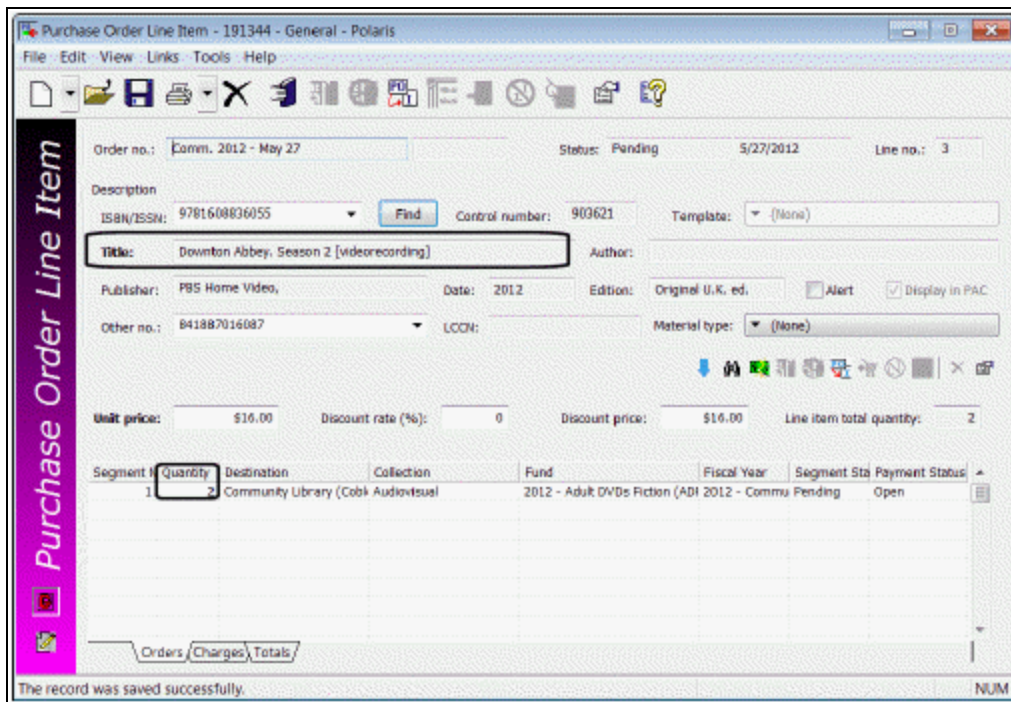
**Tip:**

Polaris automatically moves the holds placed at the bibliographic level to the first volume only when items were created and when the bibliographic records are imported using the Enriched EDI import profile. If you send a non-enriched EDI order and create items, the holds remain at the bibliographic level. In this case, you would need to deactivate the holds at the bibliographic level and place them on linked items where the volume information was entered manually.

If a patron places a hold on a new multi-volume set, such as on a television series just released on DVD, the hold is placed at the bibliographic level for the series title. Then, when the full bibliographic record is imported, the embedded holdings create the shelf-ready item records for all the volumes in the series, and the hold is automatically placed on the first volume.

When you order a new multi-volume set, you create a purchase order line item for the entire series. You may order more than one copy of the series for one branch, or you may order the series for several branches. When the purchase order is released, and items are generated, one item record is created per ordered quantity.

For example, if you order two copies of the television series, *Downtown Abbey*, Season 2, two item records are created. However, the supplier's shipment includes 6 DVDs - three DVDs for each copy of the series. In addition to the physical shipment, the supplier provides a full bibliographic record for the series with 949 tags representing each DVD.



When the full bibliographic record with embedded holdings is imported using the Enriched EDI Orders profile, the two items are updated with the appropriate shelf-ready item data. New item records are also created for every other 949 tag that has both a purchase order line item segment ID in \$e (or other subfield) and a volume designation in \$v.

Any holds that were placed at the bibliographic level for the on-order series are moved to the item with the first (or lowest) volume number. This allows patrons to place holds for a new series and then receive the first volume of that series when it arrives.

See also: [Set Holds options: Enable hold requests by patrons and define restrictions](#)

### Set Holds options: Exclude pickup branches

**Note:**

When you open the Hold options dialog box at the system level, you can specify the holds statuses for which patrons can change the pickup branch in the PAC. See [Set hold options: Enable patrons to change the holds pickup branch from the PAC](#).

To set which branches should not be available as pickup library options in the PAC and staff client:

**Note:**

For hold requests from the PAC, the settings for the patron's registered branch determine the available pickup branches.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**.  
The Hold Options dialog box - Requests tabbed page appears.
3. Click the **Pickup** tab.

Hold options [ QA-INIGO 7.5 (sys) ]

Requests Charges Preferred Pickup Pickup Area Staff client & PAC Terms RTF Queue

Pickup branches to exclude in PAC when creating requests:

- Adjacent Test Branch One
- Adjacent Test Branch Three
- Adjacent Test Branch Two
- Alexey 1
- Alexey 2
- Amsterdam Free Library
- Argyle Free Library
- Ballston Spa Public Library
- Bancroft Public Library (Salem)
- Bolton Free Library
- Burnt Hills - Town of Ballston Community Library
- Cambridge Public Library

Patrons can change pickup branch in PAC when holds have these statuses:

- Active
- Inactive
- Located
- On Hold Shelf
- Pending
- Shipped

Exclude selected branches in staff client

OK Cancel Apply Help

**Tip:**

Typically, if a branch is not included in your Holds Routing Sequence policy table, you should exclude it from the pickup branches.

4. Select the checkboxes to indicate which branches should not be available as pickup library selections in PAC.
5. To exclude the same pickup branches from the staff client, select **Exclude selected branches in staff client**.

**Note:**

To specify a particular library as a pickup branch for a hold request in the staff client, the staff member needs permission to create hold requests at that branch. However, the available pickup branch options depend on the **Exclude selected branches in staff client** settings for the logged-in branch. If there is no permission to create holds for the branch, and the branch is excluded, the list of available pickup libraries in the staff client is blank.

6. Click **Apply** to save your settings and continue to work with holds options settings, or click **OK** to save your settings and close the Holds options dialog box.

***Related Information***

- **Pick-up branch display order (PAC)** - When placing a request from PAC, the patron chooses a pickup library from a list of those you allow. The branch display order is controlled in PAC Administration.
- To specify which branches are listed as hold pickup branches in the Item Record workform, use the branch-level Polaris Administration patron services parameter **Holds: Item pickup branches**. The Pickup at list in the Item Record workform includes the branches selected in this dialog box.



## **Set hold options: Enable patrons to change the holds pickup branch from the PAC**

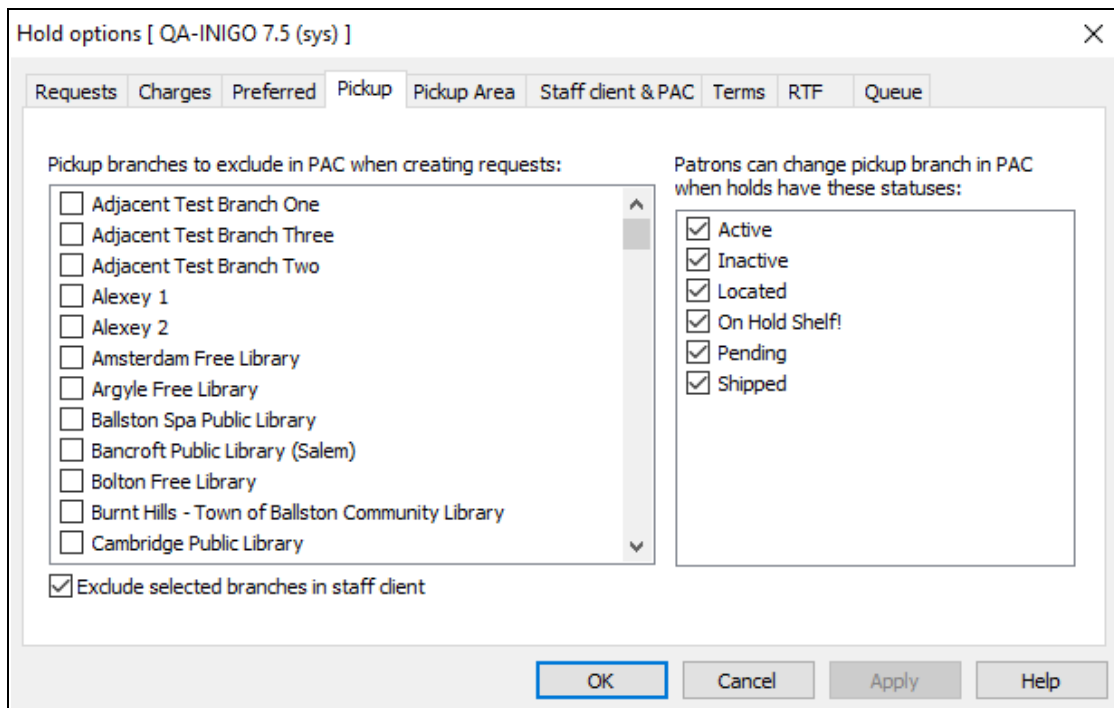
At the System level only, you can open the Holds options dialog box, select the **Pickup** tab and specify the hold statuses for which patrons can change the pickup location from the PAC (PowerPAC and Mobile PAC).

### **Note:**

If your library allows patrons to change the hold pickup location for holds with a status of Held, the holds will appear in the Held items to transfer list in the Request Manager. You can open the hold from the list and check it in. See the Patron Services PDF Guide, Check-in a held item with a changed pickup location.

To select the hold statuses for which patrons can change the hold pickup location:

1. Select **Administration > Explorer > System > Parameters**.
2. Select the **Request** tab, and double-click **Holds options**. The Hold options dialog box opens.
3. Select the **Pickup** tab.



4. Select the checkboxes to specify the hold statuses for which patrons can change the pickup branch from the PAC. If no status checkboxes are selected, the option to change the pickup location does not display in the PowerPAC or Mobile PAC.
5. Click **Apply** to set the selected options, and click **OK** to close the dialog box.

Patrons can change the pickup location for holds with the selected statuses.

**Note:**

When the hold location is changed, the number of days held restarts once the item has been checked into the new pickup location.

See also:

- [Change the hold pickup location from PowerPAC](#)
- [Change the hold pickup location from Mobile PAC](#)

## Change the hold pickup location from PowerPAC

When at least one hold status is selected in the **Hold options** parameter at the system level, patrons can select holds with any of these selected statuses in the Requests view of their PowerPAC account, and click or tap **Change Pickup Location**. If no hold

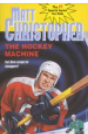








statuses are selected, the **Change Pickup Location** button does not appear. For information about the Administration parameters, see: [Set Holds options: Enable patrons to change the holds pickup branch from the PAC.](#)

To change the pickup location from PowerPAC, the patron follows these steps:

1. Logs in to the patron account in PowerPAC.
2. Selects **Requests** from the My Account menu or dashboard to see the hold requests.

Rucker, Bella - more information  
- additional note

### Requests

	Title	Status	Pickup Library	Format
<input type="checkbox"/>	 The hockey machine by Christopher, Matt, 1917-1997, author.	Pending (as of 10/4/2023)	Community Library - Smartlocker	 
<input checked="" type="checkbox"/>	 Soccer scoop by Christopher, Matt, 1917-1997, author.	Pending (as of 10/4/2023)	Community Library	 
<input type="checkbox"/>	 The fox steals home by Christopher, Matt, 1917-1997, author.	Active (since 9/12/2023)	Community Library - Curbside	 

3. Selects the checkboxes next to the holds for which the pickup location needs to change, and clicks or taps **Change Pickup Location**.

After the pickup location is changed for a hold request with a status other than Held, the new pickup location appears in the Pickup Library column. If there is a selected pickup area within the pickup location, the pick up area appears after the pickup location in the Pickup Library column. If the hold request has a status of Held, **Rerouting from [original pickup location] to [changed pickup location]** is displayed in the **Pickup Library** column.

## Change the hold pickup location from Mobile PAC

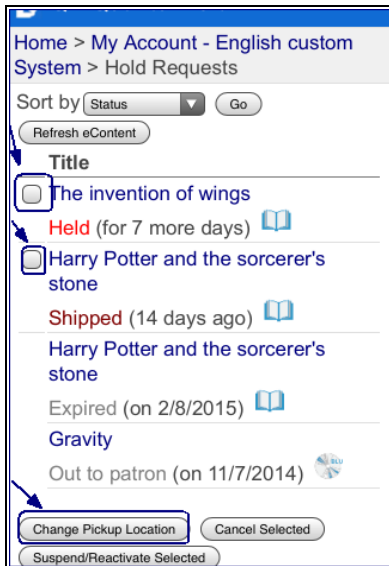
When at least one hold status is selected in the **Hold options** parameter at the System level, patrons can select holds with any of these selected statuses in the Requests page

of their Mobile PAC account, and tap **Change Pickup Location**. If no hold statuses are selected, the **Change Pickup Location** button does not appear.

To change the hold pickup location from Mobile PAC, the patron follows these steps:

1. Logs into the patron account.
2. Selects **Hold Requests**.

The Requests page is displayed.

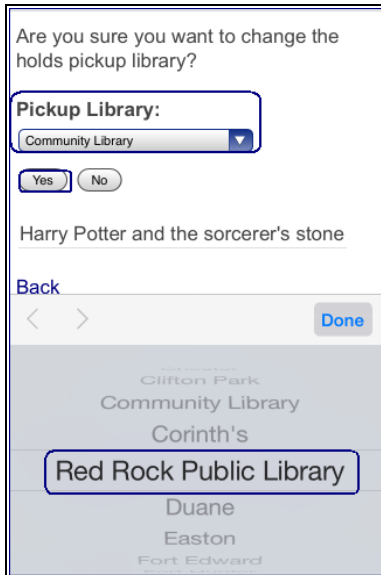


3. Selects the checkbox next to the hold or holds, and selects **Change Pickup Location**.

**Note:**

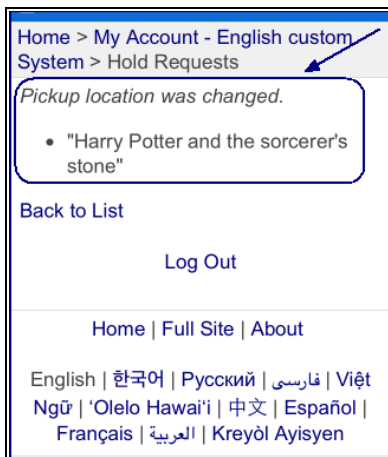
If any of the selected holds have a status for which changing the hold pickup location is not allowed, you cannot select the **Change Pickup Location** button.

The next view displays the Pickup Library list box.



4. The patron selects the new pickup library from the **Pickup Library** list and taps **Yes**.

A confirmation message is displayed.

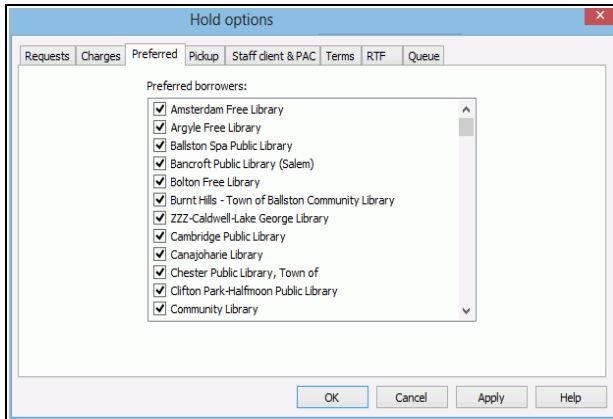


### Set Holds options: Preferred borrowers branches

Settings in this list work with the hold limit option **Preferred borrowers** in the item record. When **Preferred borrowers** is checked in an item record, the item is eligible to fill holds only when the item's assigned branch has selected (checked) the pickup branch in this list. See [Restricting Holds on Specific Items](#).

To set the pickup branches for preferred borrowers:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**. The Hold Options dialog box - Requests tabbed page appears.
3. Click the **Preferred** tab.



4. De-select (uncheck) any branches that should not be listed as items' "preferred borrowers" branches.
5. Click **Apply** to save your settings and continue to work with holds options settings, or click **OK** to save your settings and close the Holds options dialog box.

### Set Holds options: Define staff client and PAC alerts and blocks

This group of **Hold options** settings controls staff client and PAC alerts and blocks. You can also set an automatic due date adjustment based on the number of hold requests for items, so that popular items can circulate more quickly.

To set alerts, blocks, and adjusted due dates:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**. The Hold Options dialog box - Requests tabbed page appears.

3. Click the **Staff client & PAC** tab.

Hold options [ QA-GIZMO 7.3 (sys) ]

Requests Charges Preferred Pickup **Staff client & PAC** Terms RTF Queue

Trap at check-out

Display patron phone number when trapped

Alert in bulk check-in if the item will fill holds

Alert in bulk check-in if the item is held

Change due date based on ratio:

Of  Requests

To  Items

Loan period  days

Permit patron notes from PAC

Permit suspended requests from PAC (system only)

Permit cancellation on:  Shipped (system only)  Held

If no items are attached:  Alert in Staff Client  Block in PAC

If patron is blocked:  Block in Staff Client  Block in PAC/SIP

Enable request status "Out"

PAC display patron contact info (PowerPAC only)

PAC block for patron verification

OK Cancel Apply Help

4. To allow staff members to fill a hold request at check-out, select **Trap at check-out**. When this option is checked, an alert message appears when a staff member attempts to check out an item that can fill a request. This setting also blocks check-out of these items at SIP self-check units.
5. To include a patron's telephone number in a trapping message, select **Display patron phone number when trapped**. When this option is checked, the patron's phone number, name, and barcode, appear on the alert message that an item can fill a hold request.
6. Set the bulk check-in alerts:
  - **Alert in bulk check-in if the item will fill holds** - Alert staff during bulk check-in if an item can fill a hold request. Staff have the option of filling the request or not. If you leave this option unchecked, Polaris traps the item automatically.
  - **Alert in bulk check-in if the item is held** - Alert staff that an item is held. Staff can choose whether to continue to hold the item. If this option is unchecked, no message alerts staff that the item is held.

**Note:**

This setting also affects ILL items. At bulk check-in, the ILL item

status goes from Held to In, and if you check this option, the alert message appears for the ILL item.

7. To provide a note field on the PAC patron request form, allowing the patron to enter a note with the request, select **Permit patron notes from PAC**.
8. (System level only.) To allow patrons to suspend and reactivate hold requests from Polaris PowerPAC, Mobile PAC, and Polaris ExpressCheck, select **Permit suspended requests from PAC**.

Requests with the status **Active** or **Pending** can be suspended. Requests with the status **Inactive** can be reactivated.

**Important:**

If this option is disabled, patrons cannot set an activation date in the future when placing a request.

9. (System level only) In the **Permit cancellation on** section, select the hold statuses that you permit patrons and staff to cancel:
  - **Shipped.**
  - **Held.**
10. In the section called **If no items are attached**, select one or both of the following:
  - **Alert in Staff Client** - When this option is checked, staff members receive an alert message if they place bib-level hold requests when no items are attached. From the alert message, the staff member can place or cancel the hold request. If this option is not checked, no message appears and the hold request is automatically placed.

You may want to leave this option unchecked to prevent repeated messages to staff if your acquisitions staff regularly place bib-level hold requests when no items are attached—for example, from the Purchase Order or Purchase Line Item workforms. The setting for the staff member’s log-on branch controls whether the alert message is displayed.

- **Block in PAC** - When this option is checked, patrons are blocked from placing bib-level hold requests when no items are attached to the bibliographic record. The request cannot be placed from PAC, and a message advises patrons to contact the library for assistance. If this option is not checked, a message informs the patron that no items are linked to the request. The patron can continue or cancel the request. The settings for the requesting patron’s



registered branch determine how the system treats bibliographic-level hold requests when no items are attached.

11. In the section called **If patron is blocked**, for hold requests from patrons whose records are blocked, select one or both of the following:
  - **Block in Staff Client** - Select to block a hold request initiated in the staff client if the patron's record is blocked for any reason. Staff members can override the block. If you leave this box cleared, staff can place a hold for the patron regardless of any blocks on the patron's record or hold limits (see [Defining Loan and Request Limit Blocks](#)), and no block messages appear. The system uses the setting of the branch defined in the system-level Patron Services parameter **Consortium Circulation**. See [Defining Circ and Request Limit Blocks](#).
  - **Block in PAC** - Select to block a hold request initiated in Polaris PowerPAC, Mobile PAC, or Polaris PowerPAC Children's Edition if the request would exceed the setting for the total number of requests allowed or the number of requests allowed for a particular material type. See [Defining Loan and Request Limit Blocks](#).
12. To enable a request status of Out and display requests with this status in the staff client and PAC patron account, select **Enable request status "Out"**. The setting for the workstation's logon branch controls the display in the staff client; the setting for the patron's registered branch controls the display in the PAC patron account.

A request status changes to Out when a held item is checked out, allowing the request to remain available for tracking purposes until the item status changes from Out to In, Held, Transferred, In-Transit, or Lost.

**Note:**

The Out request status is automatically enabled if your library offers Borrow by Mail. See [Setting Up Borrow by Mail Circulation](#).

13. Select **PAC display patron contact info** to display the patron's contact information on the PowerPAC request confirmation page so that patrons can verify the information. A link is provided so the patron can update the information if necessary.

This feature is particularly convenient for patrons who place Borrow by Mail requests and need to check their mailing addresses.

**Note:**

This feature does not apply to Mobile PAC.

14. Select **PAC block for patron verification** to block hold requests from PAC if there is a verification block on the patron record.

This type of block is added when the patron has registered online or has requested updates to certain patron account information. See [Setting Patron Account Options](#).

15. To set an item's due date to change automatically according to the number of hold requests for the item (request-to-item ratio), follow these steps:
  - a. Select **Change due date based on ratio**.

Loan periods are shortened to a library-specified period. For example, if there were five requests for one item, the loan period for the item could be shortened to allow the item to circulate more quickly. This setting affects only loan periods of more than 7 days, and applies only to bibliographic-level holds. The calculation is based on all holdable items attached to a bibliographic record, regardless of assigned branch, and all open hold requests, but shortens the loan period of items according to the value set for this parameter by the item's assigned branch. (Non-holdable items are not included in the calculation.)

**Note:**

To display a message to circulation staff when a due date is automatically changed according to the request-to-item ratio, set the Patron Services parameter **Due date truncated: Prompt to Yes**.

- b. In the **Requests** box, type the number of requests in the requests-to-item ratio that triggers the change in due date.
  - c. In the **Items** box, type the number of items in the requests-to-item ratio that triggers the change in due date.
  - d. In the **Loan period** box, type the number of days for the loan period when the requests-per-item ratio is met.
16. Click **Apply** to save your settings and continue to work with holds options, or click **OK** to save your settings and close the Holds options dialog box.

### Set Holds options: Trapping preferences, queue settings

The holds queue is the prioritized list of Active or Pending requests for a specific title or item. By default, hold requests are arranged from the request with the earliest Active

date at the top to the request with the most recent Active date at the bottom.

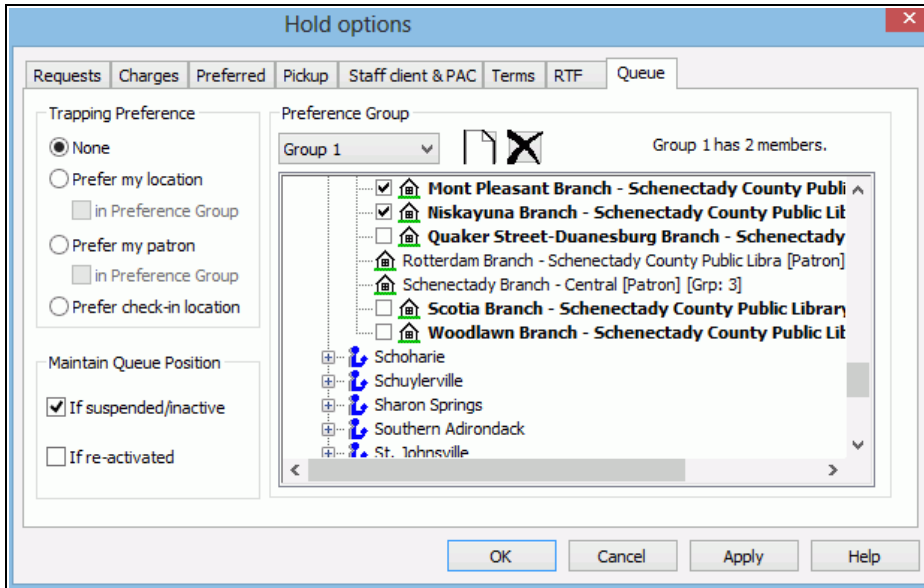
Trapping preference settings, which are optional, can override the queue and affect which request an item will fill when it is scanned at check in, nearly the last step in holds processing. They do not affect Pending requests in requests-to-fill (RTF) routing, which determines which requests to place on a pull list. Also, trapping preferences do not affect restrictions on specific items (such as restricting Withdrawn items from filling requests, or limiting a specific item to **Patrons from this branch only**). If these rules allow an item to be a candidate to fill a request, only then do trapping preferences affect which request may be filled first.


Trapping preference settings are also applied when offline files are uploaded, after the items have been checked in offline. You can suppress holds processing for items checked in offline when the offline transaction file is uploaded. Search Polaris help for "Holds Processing at Upload."

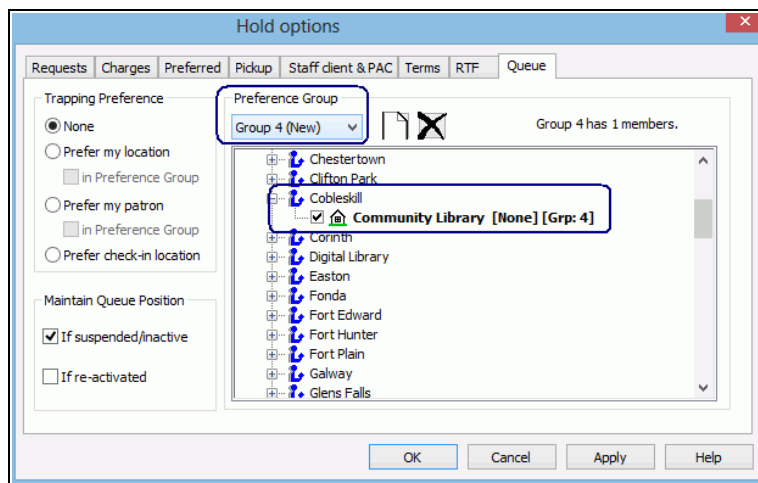
When you open the **Hold options > Queue** tab at the System level, you can set up optional trapping preference groups, which apply trapping preferences to a designated group of branches. You may find this feature useful in a consortium where various groups of organizations are far apart or have very different hold request policies. If you use trapping preference groups, you can specify whether you want preference within the group to be applied based on the hold pickup location branch or the patron's registered branch.

To set trapping preferences and other hold request queue management options:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Request** tab in the details view.
2. Double-click **Holds options**. The Hold Options dialog box - Requests tabbed page appears.
3. Select the **Queue** tab.



4. To set up an optional preference group (available at the System level only):
  - a. Open the **Hold options** > **Queue** tab at the System level, and select  to add a new preference group.
  - b. To add a branch to the group, expand the branch's parent library in the list and select the branch. To select all the branches under a parent library at once, expand the parent library and select the library name or press the space bar. You can select branches from different libraries to place in one group, but a branch can be in only one group.



The information in brackets for a branch in the group list includes that branch's trapping preference setting and the group number, if any, to which the branch belongs.

5. Select **Apply** to save your settings and continue to work with holds options, or select **OK** to save your settings and close the Holds options dialog box.

**Note:**

After you have set up a group, you can select it in the Preference Group drop-down list to display the members of the group.

6. Select a trapping preference:
  - **None** - The existing queue order is followed when an item that can fill a request is trapped during circulation.
  - **Prefer my location** - If an item's assigned branch matches the pickup branch of any request in the queue, fill that request ahead of the others. In effect, **Prefer my location** favors requests that keep or return an item to its assigned branch.
    - **in Preference Group** - If both **Prefer my location** and **in Preference group** are selected, preference is given to hold requests where the pickup branch is in the preference group, and that branch matches the item's assigned branch. When a hold request has a pickup branch that is in the preference group, and that branch matches the item's assigned branch, the hold is filled ahead of those with other pickup branches in the preference group. If you want to honor queue position within a preference group, do not select **Prefer my location**, because it overrides queue position to prefer the pickup library's requests within the preference group.
  - **Prefer my patron** - If an item's assigned branch matches a patron's registration branch of any request in the queue, fill that request ahead of others. In effect, this option favors requests that place your branch's items in the hands of your branch's patrons.
    - **in Preference Group** - If both **Prefer my patron** and **in Preference Group** are selected, preference is given to hold requests where the patron's registered branch is in the preference group, and that branch matches the item's assigned branch, regardless of queue position.

When a hold request is placed by a patron whose registered branch is in the preference group, and that branch matches the item's assigned branch, the hold is filled ahead of those placed by patrons registered at other branches in the preference group. If only **Prefer my patron** is selected, and **in Preference Group** is not selected, requests are filled for branches within the preference group but the queue position is honored. That is, the item may not go to your patron first, but it will go to the next patron in the queue that belongs to your preference group.

- **Prefer check-in location** - If an item could fill a request where the pickup branch matches the check-in branch, fill that request ahead of others. In effect, this option favors requests where the item does not need to be shipped.

**Note:**

If the check-in branch is in a preference group, priority is given to hold requests with both the check-in branch and the pickup branch in the preference group.

5. Specify how to handle the queue position of reactivated and suspended/inactive requests:

- **Maintain queue position for re-activated requests** - When this option is selected, not-supplied, expired, or canceled requests regain their position in the holds queue when they are reactivated. That is, the request will continue to move up the queue as other requests are filled. This setting also applies to requests reactivated during check out or check in. If this option is not selected, the request is placed at the end of the queue when reactivated.
- **Maintain queue position for suspended/inactive requests** - When this option is selected, and you have also checked **Permit suspended requests from PAC** (Staff client & PAC tabbed page - system level), suspended requests regain their position in the holds queue when they are reactivated. That is, the request will continue to move up the queue as other requests are filled. This setting also controls the queue position when a request placed with an activation date in the future becomes Active. If this option is not selected, the request is placed at the end of the queue when reactivated.

6. Select **Apply** to save your settings and continue to work with holds options, or select **OK** to save your settings and close the Holds options dialog box.

## Allow renewals for items with hold requests

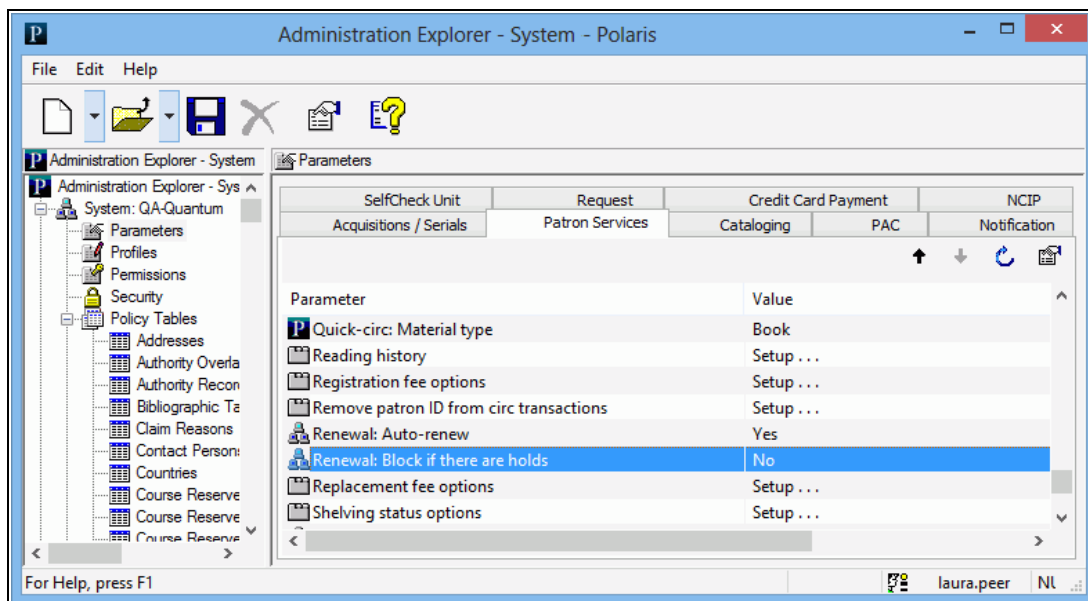
When an item is out to a patron but there are hold requests with certain statuses, a System-level patron services parameter is set by default to block the renewal and display a blocking message. Your library organization can set this parameter so that renewals are blocked only if the item being renewed is the last item that will fill the hold request.

### Note:

If you choose to set this parameter to **No**, be aware that the system does not check the eligibility status of each In item at every branch. An item may be In and holdable, but not necessarily eligible to fill requests. So it is possible, although perhaps not very likely, to allow renewal on the only item that will fill the request even though other items are In, and thus delay the request.

To set the System-level parameter to block renewals only when the item being renewed is the only item available to fill the request:

1. In the Administration Explorer tree view, open the **Parameters** folder at the System level.
2. Select the **Patron Services** tab.




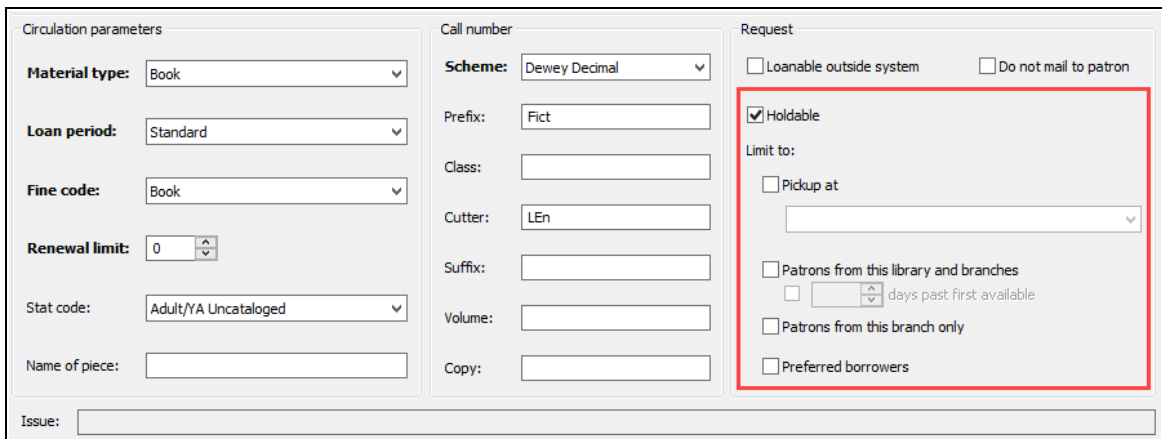
3. Double-click **Renewal: Block if there are holds** and select **No**.

When this parameter is set to **No**, and other holdable and potentially eligible items are In, no dialog box appears and the item can be renewed. (The other In items could be identified by the next round of RTF processing and pulled to fill the request.) In PAC, the renewal is allowed in the same circumstances. But if the item selected for renewal is the only item available to fill a request, the renewal is not allowed.

### Restrict holds on specific items

To restrict holds on specific items:

1. Search for and open the item record. Search the Polaris help for "Finding Polaris Records."
2. Select **View > Cataloging** or click .
3. To allow the item to be eligible for unrestricted hold requests, select the **Holdable** checkbox and clear all the **Limit To** checkboxes.



The screenshot shows the 'Request' tab in the Polaris cataloging interface. The 'Holdable' checkbox is checked, and all 'Limit to' options are unchecked. The 'Limit to' options include 'Pickup at', 'Patrons from this library and branches', 'Patrons from this branch only', and 'Preferred borrowers'. The 'Patrons from this library and branches' option has a sub-option for 'days past first available'.

4. To allow the item to be eligible for hold requests under restricted circumstances, select the **Holdable** checkbox and one (or certain combinations) of the following options:
  - **Pickup at** - Limit the item to filling hold requests only at a selected branch, not just the item's assigned branch. From this list, only one branch can be selected. Upon selection of this option, you can also select **Patrons from this library and branches** or **Patrons from this branch only**.



The branches that display for selection in the **Pickup at** list are selected in the **Holds: Item Pickup Branches** option located under **Parameters, Patron services** at the Branch organization level. See [Set up the hold pickup branch list](#).

- **Patrons from this library and branches** - Limit the item to filling hold requests from patrons registered at the item's assigned branch library and associated branches. When you select this option, you can also select **number of days past first available**.
- **Number of days past first available** - Sets the number of days a new item is available only to the assigned library's patrons. During the specified number of days, patrons from all libraries can still find the new item and place a hold. After the specified number of days, holds on the new item placed by patrons from other libraries can be filled.
- **Patrons from this branch only** - Limit the item to filling hold requests only from patrons registered at the item's assigned branch.

**Note:**

If a branch that has been selected in existing item records is removed or deselected in this SA control, the **Pickup at:** option in the item record is deselected. Additionally, requests linked to the items are not impacted since their eligibility to fill the request has not changed.

- **Preferred borrowers** - Limit the item to filling hold requests only where the pick-up library is on the preferred lender list of the item's assigned branch. See Defining Hold Processing Options. When you select this option, you cannot select any other **Limit to** options.

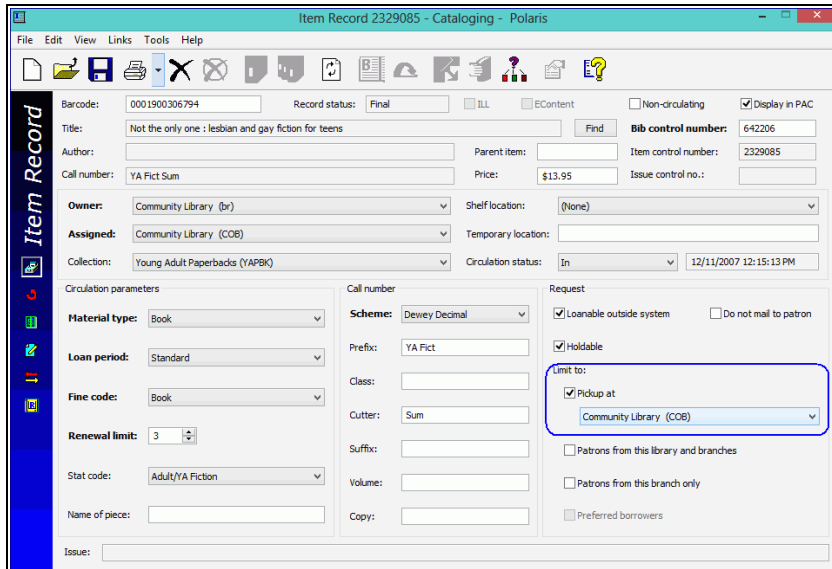
5. Select **File > Save**.

### ***Related Information***

- Restricting multiple items - To restrict multiple existing item records in the same way, search for the records and place them in a record set. For example, you may want to restrict all DVDs to the assigned branch's **Preferred lender** list. Then use the bulk change function to set the **Preferred lenders** option for all the record set members. For more information about finding item records and limiting searches by material type, search the Polaris help for "Doing an Basic Search." For more information about bulk-changing item records, search the Polaris help for "Working with Multiple Records." You can set any item hold restrictions with bulk change.
- Restricting new records - To restrict holds on all new item records of a certain material type, create an item template for the material type with the **Preferred lenders** option selected (checked). Then use the template for all new item records of this material type.
- Items relinked to a new bibliographic record - If an item is linked to a different bibliographic record after an item-level hold request is placed, the hold request is updated with the new bibliographic information.
- General information about item records - See the Cataloging PDF Guide, Creating Item Records.

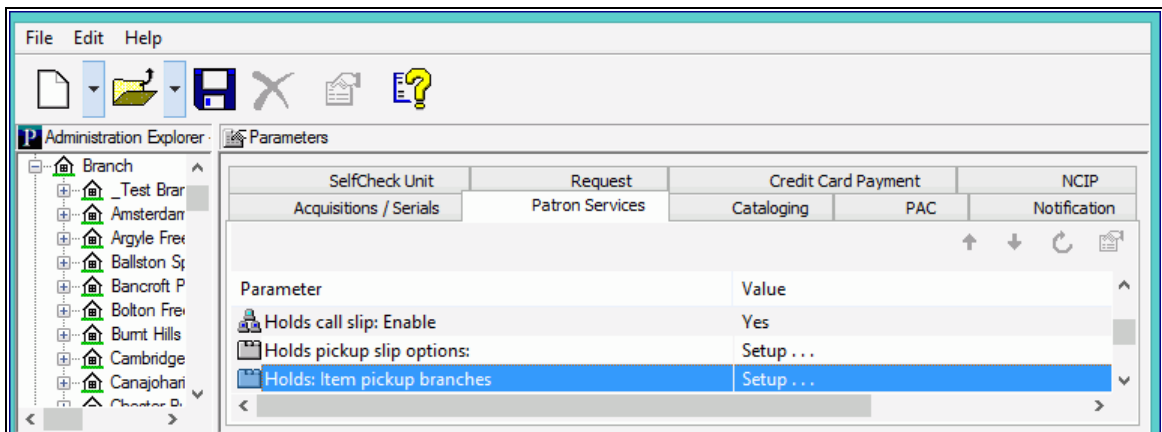
### **Set up the hold pickup branch list**

The branch-level Polaris Administration patron services parameter Holds: Item pickup branches specifies the branches that appear in the **Pickup at** list in the Item Record workflow.

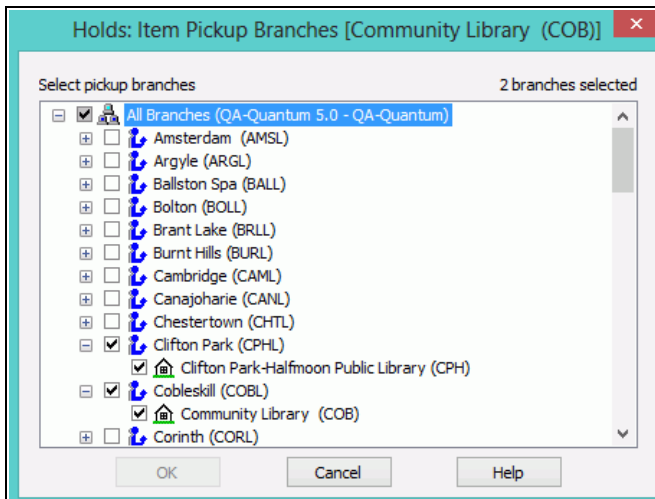


To specify the branches listed in the **Pickup at** list in the Item Record workflow:

1. In the Administration Explorer tree view, open the **Parameters** folder for the branch, and click the **Patron Services** tab in the details view.
2. Double-click Holds: Item pickup branches.



The Holds: Item Pickup Branches dialog box opens.



3. Select the checkboxes next to the branches that you want to appear in the **Pickup at** list in the Item Record workform.
4. Select **OK** to add the branches to the **Pickup at** list for the branch's item records and close the dialog box.

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## Setting Up ILL Requests

**Note:**

If your library uses INN-Reach, see the INN-Reach Integration - Implementing topic in the Polaris ILS Help.

An interlibrary loan (ILL) request is filled by routing the request to potential lenders outside of the library system. You can set Polaris to allow interlibrary loan requests from the staff client, PAC, or both.

Polaris ILL requests can be processed automatically. Automatic processing is brokered through OCLC's ILL Direct Request Service. Polaris customers who are OCLC members can use the OCLC Direct-to-Review service. With this service, ILL requests are sent to a review file at OCLC where they are reviewed by library staff and directed to OCLC lending libraries.

**Note:**

You can also allow ILL requests and process them manually or through a third-party ILL fulfillment system, without OCLC membership.

If you participate in OCLC's service, you can specify whether requests are sent directly to OCLC's Direct-to-Review service (unmediated), or reviewed by library staff and manually exported to OCLC (mediated).

Use the Request parameter **ILL options** to specify whether ILL requests are mediated or unmediated, set any restrictions, and enable the OCLC connection. You can set most ILL options at the system, library, or branch level.

To set ILL options, in the Administration Explorer tree view, open the **Parameters** folder for the organization, click the **Request** tab in the details view, and double-click **ILL options** to open the dialog box. See [Set holds options: Interlibrary \(ILL\) loan request processing](#).

## ILL Request Processing Overview

- Patron places an ILL request or a staff member converts a hold request to an ILL request
- Depending on your library's policy:
  - The ILL request status is Active and the ILL request is exported directly to OCLC.
  - The ILL request is Inactive until a staff member reviews the request and exports it to OCLC.
- OCLC processes the request and sends it to the lending library.
- The lending library ships the item to your library.
- A staff member receives the item in Polaris.
  - Temporary bib and item records are created to enable circulation.
  - The ILL request status is set to Received.
  - A notice is sent to the patron that the item is available for pickup.
- The item is checked out to the patron.
- The patron returns the item to the library.
- The item is returned to the lending library.
- A staff member deletes the ILL request, which automatically deletes the temporary bib and item record.

## Bibliographic and Item Records for ILL Items

When an item that fills an interlibrary loan request arrives at the library, staff receive the item in Polaris using a special ILL item template. Temporary bibliographic and item records are created from the template to track the item in Polaris. (For more information about this process, see the Patron Services PDF Guide, Receiving Interlibrary Loans..) Later, these temporary records are automatically deleted when the ILL request is deleted. Bibliographic and item record deletion for ILL requests honors the settings for the Cataloging profiles **Retain deleted bibliographic records** and **Retain deleted item records** for the item's assigned branch:

- If both **Retain deleted bibliographic records** and **Retain deleted item records** for the item's assigned branch are set to **Yes**, the records are retained (deleted provisionally) until purged. They cannot be undeleted, however.
- If one of the profiles is set to **No** and the other is set to **Yes**, both the bibliographic and item record will be immediately deleted and purged.

- If both **Retain deleted bibliographic records** and **Retain deleted item records** for the item's assigned branch are set to **No**, the records are immediately deleted and purged.

When an ILL bibliographic or item record is marked for deletion, the "marked for deletion" transaction is logged. When an ILL bibliographic or item record is purged (physically deleted), the transaction is logged as an "ILL delete."

**Note:**

Bibliographic and item records for ILL items cannot be deleted manually.

### ILL Requests from PAC

If you choose to allow patrons to place ILL requests from PAC, the **Place Request** button appears for titles in remote database search results. When the patron clicks **Place Request** and logs in, the system checks for settings that block hold requests from PAC (such as patron blocks, duplicate requests, and request limits). It also checks for separate blocks specifically for ILL requests. If the request is blocked for any of these reasons, the appropriate message is displayed. If the request passes these checks, the system then checks to see if any duplicate titles are available for requests in the local database. If matching local titles are detected and one or more is available, the system displays a message that includes the options to continue the ILL request for the remote title, place a request on the local title, or cancel. If the patron chooses to place the local request, the ILL process stops and the system creates a hold request. If the patron chooses to proceed with the ILL request, the system processes the request as an ILL request.

**Note:**

You can suppress the **Place Request** button for selected types of material. Your settings affect search results in both local and remote databases. See the Public Access Administration PDF Guide, Suppressing Request and Availability Options.

### Set holds options: Interlibrary (ILL) loan request processing

To allow staff (and patrons, if you choose) to request interlibrary loans:

**Note:**

If you plan to use OCLC's ILL Direct Request service and your library is not already an OCLC member, establish an account with Direct Request

service to use the Direct-to-Review service. Contact the OCLC regional office.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Request** tab in the details view.
2. Double-click **ILL options**. The ILL Options dialog appears with the **Requests** tab selected.

The screenshot shows the 'ILL options' dialog box with the 'Requests' tab selected. The dialog is organized into three main sections: 'PAC requests', 'Staff requests', and 'Patron requests'. In the 'PAC requests' section, the 'Enable' checkbox is checked, and the 'Mediate all' and 'Mediate copy' checkboxes are also checked. The 'Staff requests' section has the 'Enable' checkbox checked. The 'Patron requests' section has the 'Enable' checkbox unchecked, while 'Mediate', 'Suppress Accept alternate', and 'Suppress Amount willing to pay' are all checked. A 'Default amount' text box contains '\$0.00'. There are also text boxes for 'Header text' and 'Footer text' containing specific instructions. At the bottom of the dialog are buttons for 'Save', 'Cancel', 'Apply', and 'Help'.

3. To allow ILL requests from Polaris PowerPAC:

**Note:**

For details about PAC processing, see [ILL Requests from PAC](#).



- a. Select the PAC requests **Enable** checkbox.

**Note:**

When a patron requests a title from remote database (Z39.50) search results and signs in, a message regarding ILL requests appears according to the setting for the patron's registered branch. The default message is **You are about to place an Inter-Library Loan request for an item from a remote library system. If your library charges for Inter-Library Loan requests, your account will be charged accordingly. Do you want to place this request?** You can customize and translate the message using Polaris Language Editor (WebAdmin). The message string ID is **ILL\_TEXT\_REQINFO** (ILL "product"). For more information about using Polaris Language Editor to customize and translate messages, see the Polaris Language Editor (WebAdmin) Guide, or Language Editor online help.

- b. If you use OCLC and want your staff to review all ILL requests made by patrons before they are sent to OCLC, select the **Mediate all** checkbox.
- c. Select **Apply**.

**Important:**

The settings for the patron's registered branch determine whether the patron can place an ILL request from the PAC. You should also set up remote databases as PAC search targets. See the Polaris Administration PDF Guide, Registering Remote Resource Servers and the Public Access Administration PDF Guide, Editing Messages and Labels.

4. To allow library staff to create ILL requests in the staff client, select the Staff requests **Enable** checkbox, and select **Apply**.

**Note:**

If your library uses Leap and you have enabled ILL requests from either the PAC or staff client (or both), the ILL view is available in the Patron Registration workform in Leap. If ILL requests are not enabled, the ILL view is not available and the Patron Registration workform in Leap does not include this view.

5. To place limits on ILL requests, select the **Restrictions** tab, and do the following steps:
  - a. If you use OCLC and want your staff to review ILL requests converted from hold requests in the staff client, select the **Hold-to-ILL is mediated** checkbox. If the checkbox is cleared, the converted ILL requests are automatically sent to OCLC.
  - b. To prevent one or more categories of patrons from requesting interlibrary loans, select the checkbox for each appropriate patron code in the **Patron codes to exclude** list.
  - c. In the **Need-by** box, set the default number of days by which an ILL request should be filled.
  - d. In the **Held Period** box, specify how long an item is held for a patron to pick up before being returned to the lending library. The system takes into account the library's closed dates and days when calculating this period.

**Note:**

The **Held Period** setting controls the date that prints on the Polaris ILL hold slip, but it does not automatically change the ILL status.

**Note:**

If your library uses INN-Reach for interlibrary loans and you do not allow patrons to place ILL requests from PAC (see step 3), you can still modify the default **Need-by** and **Held Period** settings. For more information about INN-Reach, see the INN-Reach Integration - Implementing topic in the Polaris staff client help.

- e. (System level only) Choose a block option:
  - **Over 2nd level fine amount** - The patron is blocked if the money owed is over the 2nd level fine amount set by the patron's registered branch, and a block message is displayed in PAC.
  - **Over [amount]** - Select this option and set an amount. The patron is blocked if the money owed is greater than or equal to the amount you specify, and a block message is displayed in PAC. By default, this set-

ting is enabled. The default amount is \$0.01, which blocks the request if the patron owes any money at all.

- f. Select **Apply**.
6. (OCLC subscribers only) To set up your connection to OCLC's ILL service, select the **OCLC** tab, and complete these steps:
  - a. Select the **Enable OCLC connection** checkbox to indicate that interlibrary loan requests are managed through OCLC's ILL Direct Request service.
  - b. In the **OCLC Symbol** box, enter the library mnemonic for the system, library, or branch that has the account with OCLC. Contact OCLC to get this information.
  - c. Verify that the **Service URL** field contains the following URL:  
**<https://worldcat.org/isoill/request/data/>**  
The OCLC service URL is the same for all libraries.
  - d. In the **API Key** field, enter your library's OCLC API key. Contact OCLC to get this information.
7. Select **Save**.

**Important (OCLC subscribers only):**

The Polaris Application Server handles ILL direct requests to OCLC. If your application server name changes, enter the new Polaris Application Server name in the system-level Request parameter **ILL: Computer designated for sending OCLC/ILL direct requests**.

**Related Information**

- Maximum number of active ILL requests for a patron can have - See [Defining Loan and Request Limit Blocks](#).
- Loan limit for ILL items - See the Telephony Administration PDF Guide, Customizing Telephony Messages.
- Fines for ILL items - See the Telephony Administration PDF Guide, Customizing Telephony Messages.
- Alert message at bulk check-in - See [Set Holds options: Enabling, Item Status Restrictions, First Available Copy](#).
- Managing interlibrary loans in the staff client - See the Patron Services PDF Guide, Working with Interlibrary Loans.

## Defining Circ and Request Limit Blocks

Blocks interrupt circulation transactions, such as check outs, renewals, and hold requests. A threshold value determines the limit that causes a block to interrupt the transactions. Most blocks can be overridden at the discretion of the library staff member.

You can set up circulation blocks related to item records (for example, the item does not circulate) and patron records (for example, the patron owes money or has borrowed too many items). You can also set loan and request limits that trigger blocks based on patron codes and material types. Separate settings control blocks on patron-initiated renewals from the PAC or inbound telephony service. Polaris also provides the ability to block a patron from checking out or renewing materials when an associated patron record is blocked; you define default settings for this feature in Polaris Administration.

**Note:**

If your system includes self-check units, you set up blocks specifically for circulation transactions at the self-check units. For more information about SIP2 units, see [Setting Up SIP Self-Check Circulation](#). For Polaris ExpressCheck, see the Polaris ExpressCheck Administration Guide.

See also:

- [Designating Floating Collections](#)
- [Defining Loan and Request Limit Blocks](#)
- [Calculating and Blocking for Estimated Accrued Fines](#)
- [Defining Material Type Group Limits](#)
- [Defining Patron-Initiated Circulation Blocks](#)
- [Block and Allow Settings for Associated Patrons](#)

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## Defining Item Blocks

An item block stops circulation based on a setting in the item record. The **Library assigned** box on the Notes and Notices view of the Item Record workform lists the standard, library-assigned block descriptions (for example, **Be sure all parts are present**). The blocks available in the list and the order in which they appear depend on the item block description settings for the library named in the **Assigned** box on the Item Record workform. The settings of the item's assigned branch also control the blocks available for item bulk change.

**Note:**

When you are bulk-changing library-assigned blocks in an item record set, you must first select a branch because library-assigned block choices depend on the item's assigned branch.

You define the standard item blocks in the Item Block Descriptions database table. You can standardize item block descriptions among all organizations, or you can have different descriptions for each organization. You can define them at the system, library, and branch levels, but they are assigned to a specific branch when you define them, and are not inherited from a parent organization. This table can be displayed on an organization workform or with the Administration Explorer. When you open the table at the system level, you can view, add, change, and delete item block descriptions for all branches. At the library level, you can view, add, change, and delete item block descriptions for the branches associated with the library. At the branch level, you can view, add, change, or delete item descriptions for the branch, even if the entry was added at a higher level.


**Note:**

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify item block descriptions table: Allow.**

See: [Add an item block description](#)

## Add an item block description

To add an item block description in the Item Block Descriptions database table:

1. In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Item Block Descriptions**. The Item Block Descriptions table is displayed in the details view.
2. Click  to display the Insert Item Block Descriptions dialog box.
3. Select the branch that needs the item block description in the **Organization** list.

### Note:

If the Item Block Descriptions table is opened at the branch level, only the branch name is displayed in the **Organization** list.




4. Type the text describing the item block in the **Description** box.


### Note:

If the assigned branch is changed for an item with a library-defined block, the system checks whether there is matching block description text for the former and newly assigned branch. If so, the block is retained. If there is no match, the block is set to **None**.

5. Click **OK** on the dialog box. The Item Block Descriptions dialog box closes and the new entry is displayed in the policy table. The status bar indicates that the modification is pending.
6. Select **File > Save** to save your changes. The status bar indicates that the record is saved.

## Related Information

- Order the block display - Select table entries and click  or . The order of blocks in the table determines their display order when a block is added to an item record and when blocks are displayed at check-out.
- Modify a table entry - Select the entry, click , and change the description. Any changes are immediately applied to every item record that used the original block. If you need to assign the entry to another organization, delete the incorrect entry and add a new item block description for the desired organization.

- Delete a table entry - Select the entry and click . However, you cannot delete a block description if the block is currently assigned to an item.

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## Managing Hold Requests

Use the Request parameter, **Hold options**, to specify how your library organization manages holds. In the Administration Explorer tree view, open the **Parameters** folder for the System, and click the **Request** tab in the details view. Then, double-click **Holds options** to open the Hold Options dialog box.

See also:

- [Set Holds options: Charge for hold requests](#)
- [Set Holds options: Expiration and Unclaim limits, Deletion options](#)
- [Set Holds options: Enabling, Item Status Restrictions, First Available Copy](#)
- [Set Holds options: Exclude pickup branches](#)
- [Set Holds options: Enable patrons to change the holds pickup branch from the PAC](#)
- [Set Holds options: Preferred borrowers branches](#)
- [Set Holds options: Alerts and blocks](#)
- [Set Holds options: Trapping preferences, queue settings](#)

To allow renewals when an item is out to a patron but there are hold requests with certain statuses, the renewal is blocked by default. You can change the setting to allow renewals of these items as long as the item is not the only one available to fill the request. See [Allow renewals for items with hold requests](#).

To prevent holds from being placed on a specific item, see [Restrict holds on specific items](#).

To allow patrons to place multiple holds at once from Polaris PowerPAC working or saved title lists, see the Public Access Administration PDF Guide, Bulk Hold Requests from Polaris PowerPAC Title Lists.

### **Add, select, and order patron block descriptions**

To add a patron block to the Patron Block Descriptions table, then select blocks for branch use, determine their display order, and designate whether they trigger display text in the PAC patron account:



1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Patron Block Descriptions**.

If you open the table at the system or library level, you can add new blocks. If you open the table at the branch level, the table includes controls for selecting and ordering blocks, and specifying which ones should display a message in the PAC patron account.

2. **(System or library level only)** To add a new block, follow these steps:

- a. Click  to display the Insert Patron Block Descriptions dialog box.
- b. Type text describing the patron block in the **Description** box.


**Note:**

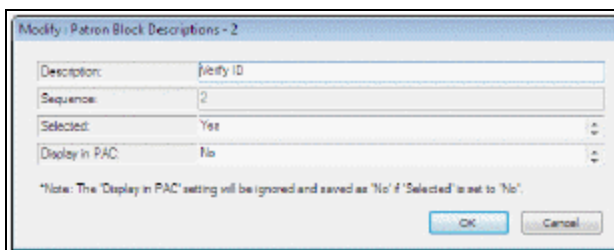
The description can be up to 80 characters long. For best display results, limit your description to fewer than 40 characters.

- c. Click **OK** on the dialog box.

The Insert Patron Block Descriptions dialog box closes, and the new patron block entry is displayed in the table. The new block is displayed in the table for all organizations. Each branch can decide whether to use the block (set to **Yes** by default), and determine the order of blocks in lists in staff client dialog boxes and user controls.

3. **(Branch level only)** To select or de-select blocks for use by the branch, or to change their Display in PAC status, follow these steps:

- a. Double-click the block that needs the change, or select the block and click . The Modify Patron Block Descriptions dialog box opens.



- b. Select **Yes** or **No** in the **Selected** box to indicate whether the new block should be selected for use at the branch.
- c. Select **Yes** or **No** in the **Display in PAC** box to change that status.

The **Selected** box must be set to **Yes** if you want to set **Display in PAC** to **Yes**. That is, a block must be set to display for the patron's registered branch in the staff client if you also want to display the library-block text in the PAC patron account summary.

**Note:**

You can set the display text with the PAC profile **Patron library assigned and free text block default text** (maximum 255 characters). The profile is available at the system, library, and branch levels. The default setting is **Library assigned block**. The same text is displayed for any library-assigned block you set to display in PAC, and when the patron record has a free text block.



- d. Click **OK**.

**Note:**

You can also change the description at the system, library, or branch level. Limit your changes to correcting spelling or using a different choice of words for the same type of patron block.

**Important:**


If you set a block for address check and/or expiration dates in the past, when the address check term or expiration term is updated in a patron record, the system process that removes the block looks for the exact block text specified in the **Patron Block Descriptions** table. If the Address Check or Expiration block text is missing or has changed since the block was placed on the patron record, the patron record will still be blocked when one of these dates is in the past, but the block will never be removed by real-time or overnight processing and will need to be manually removed.

4. (**Branch level only**) To order the block display, select any block in the table with a status of **Yes** and click  or .

The order of blocks in the table determines their display order in the New Block dialog box when a block is added to a patron record, when blocks are displayed at check out, and when multiple blocks are listed in the Delinquent Patrons Report.

5. Select **File > Save**.

### **Related Information**

Delete a table entry - Select the entry and click . You cannot delete a block description if the block is currently assigned to a patron.

### **Set up blocks for claims**

When a patron receives an overdue notice or a bill, the patron may claim that she never had an item or that the item was returned. The claim is recorded in the patron's record. You can set Polaris to block transactions for patrons who have too many claims. To block patron accounts automatically based on current and total claims:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Claims: Number patron can have at one time**, and type or select the number of current (unresolved) claims a patron can have before the patron's account is blocked.
3. Double-click **Claims: Total number allowed**, and type or select the number of total (lifetime) claims a patron can have before the patron's account is blocked.

**Note:**

Staff with appropriate permission can reset this count to 0. See the Patron Services PDF Guide, Reset a patron's total claims count.

4. Select **File > Save**.

### Related Information

Overdue fines on claimed items in estimated fines - See [Set up estimate accrued fine calculations and blocking](#).

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## Defining Loan and Request Limit Blocks

Loan and request limit blocks interrupt circulation transactions based on the thresholds you set for patron overdues and fines, item limits, and request limits. Each branch may set different limits, and the limits can be different for each patron code. In the staff client, a check-out clerk with appropriate permission may override a loan or request limit block (except the second-level fine block). In the PAC, a message is displayed and the renewal is stopped. You can specify whether request limits block PAC requests. See [List and modify loan and request limit entries](#).

### **Important:**

The System-level Patron Services parameter **Consortium Circulation** determines which branch's settings are used for loan and request limit blocks. For request limits, the "transacting branch" is the pick-up branch for the request, not the staff member's logged-in branch. See [Defining Circ and Request Limit Blocks](#).

See also:

- [Patron Overdue Limits](#)
- [Fine Limits](#)
- [Item \(Loan\) Limits](#)
- [Governing Library for Loan and Request Limits](#)
- [Setting Up Loan and Request Limit Blocks](#)

### **Patron Overdue Limits**

A patron has too many overdue items, based on the number of items and the patron code. These blocks occur when the patron attempts to check out or renew an item.

### **Fine Limits**

Blocks for unpaid fines are based on the total amount the patron owes and the patron code. These blocks occur when the patron attempts to check out or renew an item. You can define two fine limit levels. The first (minor) fine limit block allows libraries to

remind patrons that fines are owed, but does not disrupt a busy circulation desk for minor fines. The second (major) fine a [separate permission](#) is required to continue the transaction. See [Defining Loan and Request Limit Blocks](#).

**Example:**

The first fine limit may be set to \$.10 (10 cents) the second to \$10.00. If the patron owes over \$.10 but is not over \$10.00, a courtesy block, not requiring permission to continue, will display. If the patron owes over \$10.00 a different block message appears. Staff will require a separate permission to continue.

Note that all threshold blocking is based on values up to and including the value set in the System Administration control. Setting a fine limit of \$10.00 or an item limit of 15 means that the patron can have up to \$10.00 in fines or up to 15 items, but will be blocked at \$10.01 or 16 items.

You can manipulate the settings for special conditions:

- Block for any fines - Set the first fine limit to 0.00 to block the transaction if the patron has any unpaid fines. The permissioned staff member can bypass the block at her discretion. To require a supervisor override for any unpaid fines, set the first fine limit to 999999.99 and the second limit to 0.00.
- Do not block for fines - Setting the first or second level fine limit to 999999.99 effectively suppresses the block at that level.
- Fine notices - If your library uses fine notices, set the second level fine amount to a value equal to or less than the setting in the **Minimum balance** box for fine notices (Notification options). This combination of settings blocks the patron at circulation before a fine notice is sent, which helps prevent additional fines after notification. For more information about fine notices, see [Fine Notices](#).

You can choose to include estimated accrued fines in the blocking calculation. See [Calculating and Blocking for Estimated Accrued Fines](#).

### Item (Loan) Limits

A patron has too many total items, too many items of a specific material type, or too many course reserve items borrowed at the same time. For example, if the items out limit is set to 10, the block occurs if the patron attempts to Borrow an eleventh item without returning any of the other ten items. These blocks occur as each item is scanned at check-out, but not at renewal. To set these limits, see [List and modify loan](#)

[and request limit entries](#). You can also set limits on groups of material types for specific patron codes. See [Defining Material Type Group Limits](#).

**Note:**

The optional increased check-out limits feature can increase the total item limit and the material type limits for enabled patrons. See "Increasing Check-out Limits by Branch" in the Leap help for more information about this feature.

### Total Requests and Request By Material Type Limits

These blocks occur in the PAC and at SIP self-check stations when a patron has too many requests (status of Active or Pending, and optionally Held/Shipped or Inactive) or too many requests for a specific material type at the same time. The request limit blocks occur in the staff client when you have selected the holds option **Block in staff client** (see [Set Holds options: Alerts and blocks](#)). If you have selected this option, a block message is displayed in the staff client, and staff members have the option of overriding the block. The request is then placed as Active. If the **Block in staff client** option is not selected, no block message is displayed and the request is placed as Active (or whatever status is appropriate), regardless of any request limits you set. Patrons are automatically blocked in the PAC and at the SIP self-check station when they try to place a request that is one over the specified limit.



In the case of material type limits, for item-level requests, the limit for the item's material type is checked directly. Items with valid barcodes and items without barcodes but with a status of On Order or In Process are included in the limit check. For bibliographic-level requests, the limit for each attached item's material type is checked, and the Holds Options setting **If all material limits are exceeded set to Not Supplied** determines how the request is handled in the staff client when a patron reaches the hold limit by material type. If this option is checked, and all the items attached to the bibliographic record have the same material type, a block message is displayed in the staff client, and staff members have the option of overriding the block. If the block is overridden, the request is placed with a status of Not Supplied. The Not Supplied reason is **All items denied by system**. If some items have the limited material type and some do not, a message is displayed and those of the limited material type are automatically denied by the system. If this option is not checked, and all the items attached to the bibliographic record have the same material type, a block message is displayed in the staff client, and staff members have the option of overriding the block. If the block is overridden, the request is placed with a status of Active. If some items have the limited material type and some

do not, a message is displayed and those of the limited material type are automatically denied by the system. See [Set Holds options: Alerts and blocks](#).

For bibliographic-level requests where no items are attached to the bibliographic record, the limit is not checked. You can allow or deny holds on these items with a separate Holds Options setting. See [Set Holds options: Alerts and blocks](#).

**Note:**

The system includes a patron's inactive requests when calculating whether the patron will exceed the total request limit or request by material type limit. This prevents patrons who are near the limit from suspending a number of requests in order to place more. The limit is also checked when a cancelled hold is reactivated.

The Hold request workform - Notes view displays a blue icon  for the item if the system denied the request on that item, or a red icon  if a staff member denied the request.

### Governing Library for Loan and Request Limits

The governing library for patron blocks determines which branch's request limit settings are used (see [Defining Circ and Request Limit Blocks](#)).

**Example:**

**Governing library = Transacting branch**

The request is placed from branch A, the patron is from branch B and the pick-up branch is branch C. Branch C's limit settings apply because it is the transacting branch.

**Governing library = Patron branch**

The request is placed from branch A, the patron is from branch B and the pick-up branch is branch C. Branch B's limit settings apply because it is the patron's branch.

Since the same governing library setting applies to both the loan and request limits, you may want to coordinate the settings for total item limits and total request limits. Some libraries set these limits to an equal value, reasoning that a patron should not be able to request an item if the patron cannot check it out. Alternatively, you may want to set the hold request limit without regard to the item limit, since the number of items checked out may change by the time a request is filled.

## Setting Up Loan and Request Limit Blocks

The loan and request limit blocks are set with the Patron/Material Type Loan Limit Blocks policy table. They can be defined from the system, library, and branch levels, but are always assigned to a specific branch. They are not inherited from a parent organization. The table is displayed with the Administration Explorer only. When you open this table at the system level, you can view and change loan and request limits for all branches in Polaris. At the library level, you can view and change loan and request limits for the branches associated with the library. At the branch level, you can view and change the limits for the selected branch. Each organization can change limit blocks assigned specifically to the organization, even if the entry was added at a higher level. New patron and new material type entries are added automatically to the Patron/Material Type Loan Limit Blocks policy table:

- When a new patron code is added to Polaris, a patron loan limit entry is added automatically for every branch.
- When a new material type is added to Polaris, a material loan limit entry is added automatically to the table for every patron loan limit entry for each branch.
- When a new branch is added to Polaris, all patron and material type entries are added automatically to the table for every patron code and material type.

The new entries use default values as the thresholds. You can change the values after the entries are added to the table. You cannot add entries to or delete entries from the Patron/Material Type Loan Limit Blocks table.

### Note:

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify patron/material type loan limit blocks table: Allow.**

All threshold blocking is based on values up to and including the value set in the System Administration control. Setting a fine limit of \$10.00 or an item limit of 15 means that the patron can have up to \$10.00 in fines or up to 15 items, but will be blocked at \$10.01 or 16 items.

## List and modify loan and request limit entries

To view and modify the entries in the Patron/Material Type Loan Limit Blocks table:

### Important:

The system-level Patron Services parameter **Consortium**



**Circulation** determines which branch's settings are used for loan and request limit blocks. For request limits, the transacting branch is considered to be the pick-up branch for the request, not the staff member's logged-in branch. For details, search the Polaris help for "Governing Library for Circulation Transactions."

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization.
2. Select **Patron/Material Type Loan Limit Blocks**. The Patron/Material Type Loan Limit Blocks table is displayed in the details view.

The top portion of the table shows the limits for each patron code, organized by branch. Use the horizontal scroll bar to see all the limit categories (**1st Level Fine, 2nd Level Fine, Total Overdue, Total Holds, Total ILL, Total Reserve Items**.) Use the vertical scroll bar to see all the branch/patron code entries.

3. To modify the limits for a patron code:
  - a. Select the branch/patron code entry in the top portion of the table, and click



The Modify: Patron Loan Limits dialog box appears.

Organization:	Community Library (Cobleskill)
Patron Code:	Regular
1st Level Fine:	\$0.00
2nd Level Fine:	\$5.00
Total Item Limit:	50
Total Overdue:	2
Total Holds:	50
Total ILL:	0
Total Reserve Items:	0


- b. Type new values for the limits you want to modify, and click **OK**:
  - First and second level fines - See [Fine Limits](#). If both first and second level fine limits are set to identical values, two blocks are displayed during a transaction. Identical settings for both fine limits are not recommended unless you are suppressing all blocks for unpaid fines. In that case, set both limits to 9999.99.
  - Total limits - The number in **Total overdue items** is the sum of items overdue and items long overdue. Circulation to the patron is blocked

when their total overdue items exceeds the number you specify. You can type a number that you believe will not be exceeded, such as **999**, if you do not want to block circulation based on one of these specific totals. For example, if you do not want to block circulation for this patron code based on how many overdue items the patron has, type **999** in the **Total Overdue** box. The combined system limit for **Total Item Limit**, **Total Overdue**, **Total Holds**, and **Total ILL** is 3,000. The system limit for **Total Reserve Items** is 999.

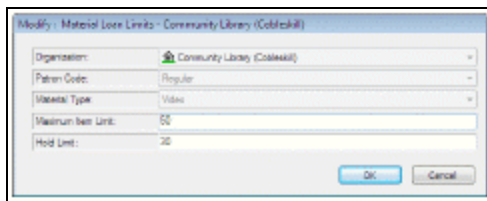
4. To view the material loan and request limit entries for a specific patron classification, select the branch/patron code entry in the top portion of the table.

The material loan and request limit entries for the selected entry are displayed in the bottom portion of the table. The view lists the maximum item limits for each material type. Use the vertical scroll bar to see all the material type entries. Use the horizontal scroll bar to see the **Maximum Item Limit** and **Hold Limit** columns.

5. To modify the maximum number of items of a specific material type that can be checked out for a specific branch/patron code, follow these steps:
  - a. Select the branch/patron code entry in the top portion of the table.
  - b. Select the material type you want to modify in the bottom portion of the

table, and click .


The Modify Material Loan Limits dialog box appears.



- c. Type the new setting in the **Maximum Item Limit** box, and click **OK**. The maximum is 3,000.

**Note:**

You can also set check-out limits on groups of material types for specific patron codes. See [Defining Material Type Group Limits](#).

6. To modify the maximum number of items of a specific material type that can be requested for a specific branch/patron code, follow these steps:
  - a. Select the branch/patron code entry in the top portion of the table.
  - b. Select the material type you want to modify in the bottom portion of the table, and click . The Modify Material Loan Limits dialog box appears.
  - c. Type the new setting in the **Hold Limit** box, and click **OK**. The maximum is 3,000.

This setting applies only to hold requests, not ILL requests. The material request limits you set for each patron code/material type combination do not need to add up to the Total Holds limit. For more information about this setting, see [Total Requests and Request By Material Type Limits](#).

**Note:**

A separate setting blocks hold requests from the PAC if the request would exceed the setting for the total number of requests allowed, or the number of requests allowed for a particular material type. See [Set Holds options: Enabling, Item Status Restrictions, First Available Copy](#).

Items with valid barcodes and items without barcodes but with a status of On Order or In Process are included in the limit check.

7. Select **File > Save** to save any changes. The status bar indicates that the record is saved.

**Related Information**

- Limiting check-out by material type group - You can set up groups of material types and limit the number of items belonging to the group that can be checked out to specific patron codes. See [Defining Material Type Group Limits](#).
- The optional increased check-out limits feature can increase the total item limit and the material type limits for enabled patrons. See "Increasing Check-out Limits by Branch" in the Leap help for more information about this feature.
- Blocks on long-overdue items - You can set an additional circulation block in the staff client based on an item's long-overdue status. Two parameters affect this block. The period after which an overdue item changes to "long overdue" is set with the Patron Services parameter **Overdues: # of days until long overdue**. Then,

set the Patron Services parameter **Overdues: Block for long overdue items** to **Yes**. You can set these parameters at the system, library, or branch level.

- Patron codes - See [Defining Patron Codes](#).
- Material types - See [Defining Material Types](#).
- Blocks on renewals from PAC or Polaris Phone Attendant - See [Defining Patron-Initiated Circulation Blocks](#).
- Blocks on self-check circulation - SIP self-check units use your settings in the Patron Loan and Request Limits table for maximum fines, items out, items overdue, and request limits. For other SIP self-check settings, see Setting Up Bibliotheca ITG DiscXpress II. For Polaris ExpressCheck, see the Polaris ExpressCheck Administration Guide.
- Blocks on using Wireless Access Manager (WAM) - If your library uses the WAM application, you can prevent patrons with blocked accounts from using wireless access. Set the Patron Services parameter **WAM: Block if Patron has stops** to **Yes** at the system, library, or branch level. When you set this parameter at the branch level, it applies to patrons registered at that branch no matter where the blocked patron tries to use wireless access. That is, even if the blocked patron tries to use WAM at a branch that sets this parameter to **No**, the patron cannot use WAM at that branch. For more information about WAM, see the Wireless Access Manager Administration Guide, available on the Innovative Customer Supportal (<https://support.iii.com>).

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## Calculating, Blocking for, and Displaying Estimated Accrued Fines

Polaris provides the ability to display an estimated fine amount (accrued fines) for overdue items a patron has currently checked out. You can opt to include claimed and/or lost items in the estimate calculation (system level only). The estimated fine amount information is available in the staff client, the PowerPAC and Mobile PAC patron account, and the Polaris ExpressCheck patron account.

In addition, you can choose to block the patron for a threshold amount that is the total of actual fines and accrued fines, not just fines already on the patron account, using the normal fines block functionality (see [Fine Limits](#)). If you choose to include accrued fines in blocking calculations, the accrued fines are added to any existing fines in real time and patrons are blocked as appropriate, using the normal fines block. The option to include accrued fines in blocking calculations is available at the system level only. This function applies to all check-out and renewals in Polaris, including staff client check-out and renewal, ExpressCheck check-out and renewal, renewal from PowerPAC or Mobile PAC, telephony renewal, and SIP check-out and renewal.

- Governing library - The calculation of the accrued amount is based on the setting of the governing library for fine calculation, set in the system-level Patron Services parameter **Consortium circulation**. (If that option is set to **Use transacting branch**, the calculation is based on the lending branch's settings.)

**Note:**

In some lost item scenarios it is possible to have a lost item where the replacement and overdue charges have not been charged. If the Transacting branch (the branch where the item is checked in) has been selected as the governing library for lost item recovery, that branch's charges would apply when and where the item is finally recovered, which cannot be known in advance. In this case the estimated amount will be based on the loaning branch's settings.

- Hourly loans - Accrued fines on hourly loans are calculated in real time and added to any actual fines at the time the block is calculated.

- Maximum fine limit - When the total amount is calculated and displayed, the displayed amount will not exceed the maximum fine limit per material type as defined in the Fines policy table, even if the calculated amount is greater. In other words, the patron will not be charged for an amount greater than the maximum fine limit.
- Lost items with overdues - You can opt to include items in the estimated fine calculation that are declared or billed lost but the overdue fine has not been charged. See [Set up estimate accrued fine calculations and blocking](#).
- Claimed items - You can also opt to include claimed items in the estimated fine calculation. See [Set up estimate accrued fine calculations and blocking](#).
- Claimed and lost items in PAC patron account display - The PAC patron account displays claimed and lost items only if the PowerPAC profile (and Mobile PAC profile, if applicable) **Navigation: Claimed and Lost** is set to **Yes** for the patron's registered branch. If it is set to **No**, the patron may be blocked for accrued fines that are not obvious in the patron account display. Many libraries have a lost item limit block and/or a claimed item limit block, and these may block the account before or in addition to the accrued fines block.
- Notification and reporting - The accrued amounts are not included on overdue notices, in the calculation for billing, or in calculations for collection agency reporting.

In summary, accrued fines are calculated for overdue items if the Patron Code/Fine Code Fine Amount definition is greater than \$0.00 and any one of the following conditions is true:

- The circulation status is Out and the item is overdue, but the overdue fine is not charged.
- You have opted to included claimed items in the calculation, the item circulation status is Claimed, and the system-level Patron Services parameter **Overdues: Charge fines for claimed items** is set to **Yes**. The table summarizes the effects of claimed items settings:

Include claimed items in accrued fine calculation	Overdues: Charge fines for claimed items	Include in estimated amount calculation and block?
Y	Y	Y

Include claimed items in accrued fine calculation	Overdues: Charge fines for claimed items	Include in estimated amount calculation and block?
Y	N	N
N	Y	N
N	N	N

- You have opted to include lost items in the calculation, the item circulation status is Lost, and the overdue fine has not been charged. The table summarizes the effects of lost items settings:

Include lost items in accrued fine calculation	Lost items charge options: Charge overdue	Include in estimated amount calculation and block?
Y	Y	Y
Y	N	N
N	Y	N
N	N	N

For set-up instructions, see [Set up estimate accrued fine calculations and blocking](#).

### Displaying Estimated Fines

Estimated fines are available for display in both the staff client and PAC. (Including accrued fines in blocking calculations is optional and set at the system level. See [Set up estimate accrued fine calculations and blocking](#).)

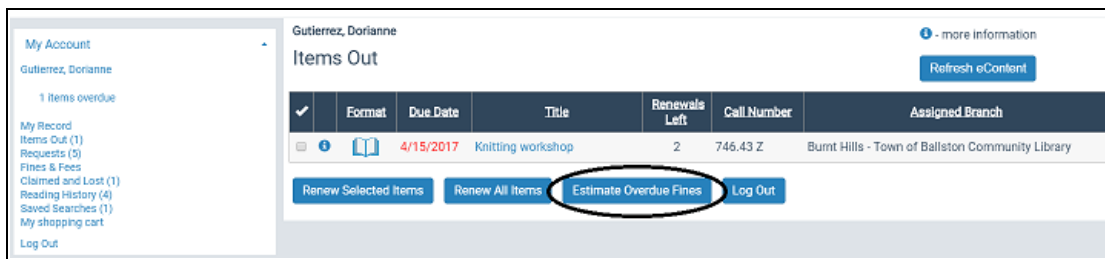
#### Staff Client Display

From the Patron Status workform - Items Out view, staff can estimate accrued fines on items that are currently overdue, calculating the fines if the items were returned today or on a date selected from a calendar. If you choose to include lost and/or claimed items in the accrued fine calculation, similar functionality is available from the Patron Status

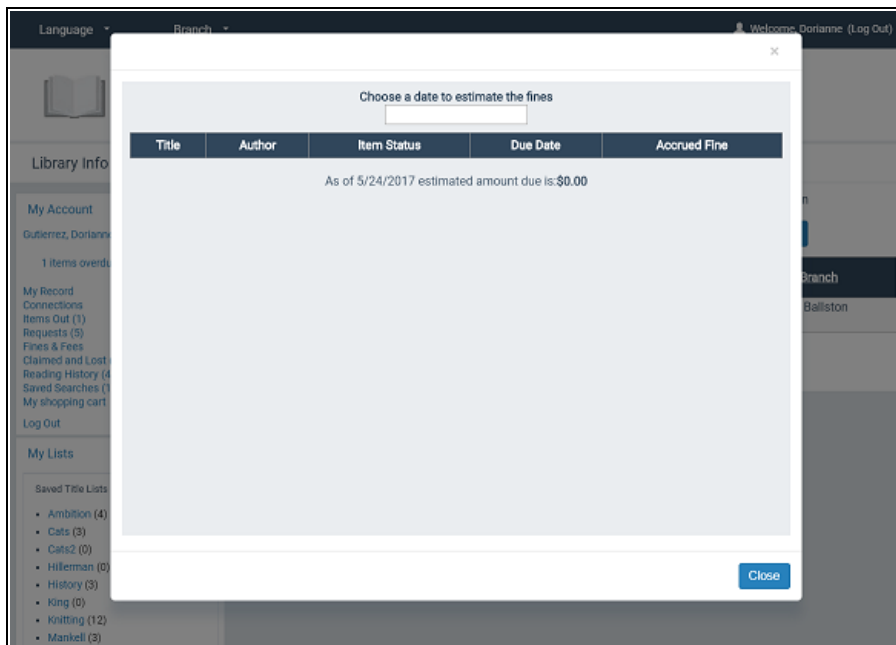
workform - Claims view. See the Patron Services PDF Guide, Estimate fines on currently checked out items.

### PAC Patron Account Display

In PAC, the patron can estimate accrued fines from the Items Out page, the Fines & Fees page, and the Claimed & Lost page of the patron account. In PowerPAC, the option to estimate overdue fines appears below the list if there are overdue items. The example shows the Items Out page.

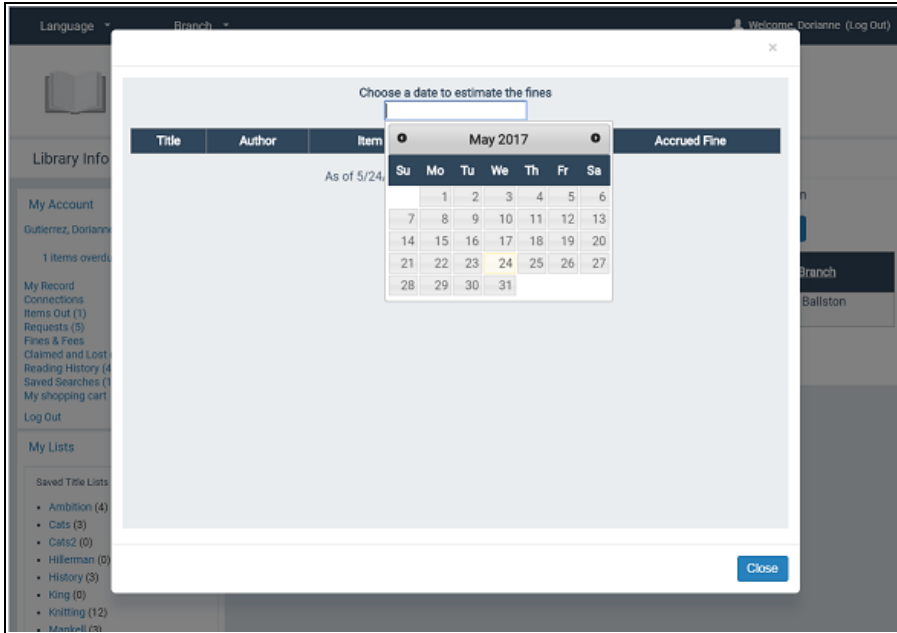


When the patron clicks **Estimate Overdue Fines**, a light box displays the title, author, item status, due date, and accrued fine for each overdue item, as well as the total due as of the current date. If you have opted to include claimed and/or lost items in the estimate, these are included in the display and calculation.

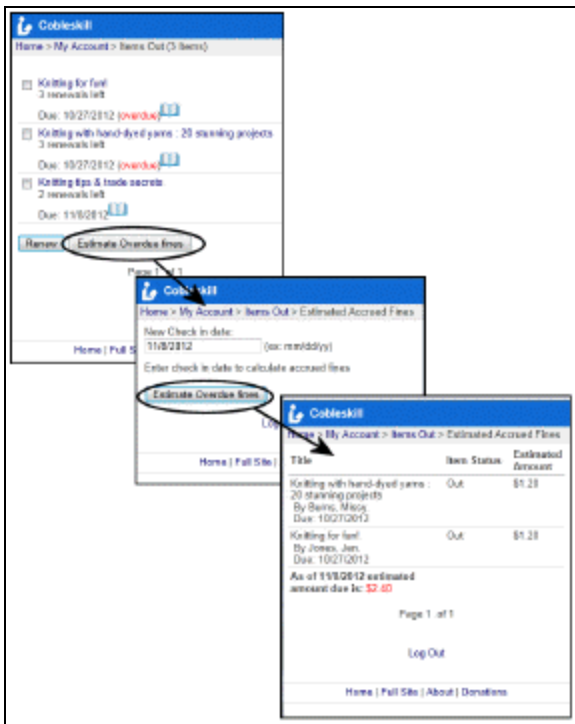


The patron can click the date field to select a different estimation date from a calendar.





Mobile PAC offers similar features.



If you choose to include accrued fines in the patron blocking calculation, the patron fine block message appears when appropriate in PAC and the patron cannot renew items.

**Note:**

If the estimated amount includes lost item overdues or claimed items, the patron account is blocked. However, claimed and lost items are only displayed in the PAC patron account if the PowerPAC profile (and Mobile PAC profile, if applicable) **Navigation: Claimed and Lost** is set to **Yes** for the patron's registered branch.

ExpressCheck Patron Account Display

ExpressCheck users can estimate fines using a dashboard control in the patron account. The patron sets the date and clicks **Calculate**.

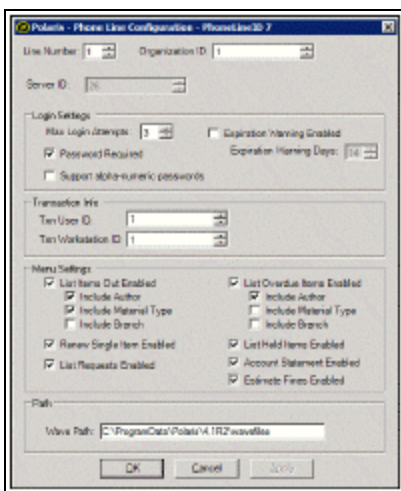


The accrued fines are displayed according to the selected date.



### Polaris Phone Attendant (Inbound Telephony)

You enable a selection to hear estimated fines at the top-level menu. (If the patron does not have any overdue or claimed items, the option is not available.) When the patron selects this option, the message includes the author, title, due date, and estimated amount for each item, and the total due. To enable this option, select **Estimate Fines** in the Phone Attendant configuration utility. For details, search Polaris help for "Set Phone Attendant options for specific lines."



If the patron has lost or claimed items and overdue items, an additional message states **Additional charges are due for lost or claimed items, please contact the library for**

**more information.** If the patron has only lost or claimed items but no overdue items, only the **Additional charges message** is played.

### Set up estimate accrued fine calculations and blocking

To set whether to include lost and/or claimed items in accrued fine estimates, and whether to include accrued fines in blocking calculations:

1. In Polaris Administration (system level only), double-click the Patron Services parameter **Accrued fine options**. The Accrued fine options dialog box opens.
2. If you want to include overdue fines for claimed items in the estimated fine calculation, select **Include claimed items in accrued fines**. When this option is checked, the claims list view in the Patron Status workform displays **Claimed/Accruing** for claimed items with accruing overdue fines.

#### Note:

If the system-level Patron Services parameter **Overdues: Charge fines for claimed items** is set to **No**, and the **Include claimed items** option for accrued fines is set to **Yes**, no overdues will accrue. The **Include claimed items** option setting has no impact in this case.

3. If you want to include overdue fines for lost items in the calculation, select **Include lost items in accrued fines**. When this option is checked, the claims list view in the Patron Status workform displays enhanced information for lost items with accruing overdue fines as follows:

Overdue is charged when the item is billed:

- Lost with unpaid replacement and unpaid overdue: **Lost/Unpaid**
- Lost with paid replacement and unpaid overdue: **Lost/Accruing**
- Lost with unpaid replacement and paid overdue: **Lost/Unpaid**

Overdue is charged when returned:

- Lost with unpaid replacement and accruing overdue: **Lost/Unpaid**
- Lost with paid replacement and accruing overdue: **Lost/Accruing**

#### Note:

If the branch-level Patron Services parameter **Lost items charge options: Charge overdue when returned** is set to **No**, and the **Include lost items** option for accrued fines is set to **Yes**, no overdues will accrue. The

**Include lost items** option setting has no impact in this case. If **Lost items charge options: Charge overdue when returned** is set to **Yes**, the lost item charge options are applied according to the governing library for fines.

4. If you want to block patrons based on estimated fine amounts, select **Block for estimated fines**.
5. Click **OK**.

*Related Information*

- **Displaying estimated fines** - [Displaying Estimated Fines](#)
- Claims settings - [Set up blocks for claims](#)
- Lost item settings - [Overdue Fines on Lost Items](#)

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## Defining Material Type Group Limits

You can create groups of material types and place check-out limits on the group as a whole for specific patron codes. The group limit may be different from the individual limit on each material type that is part of the group. For example, a patron code may have individual limits of DVD = 5 and Blu-Ray discs = 2. A patron with that code may check out up to five DVDs and 2 Blu-Ray discs. (These individual limits are set in the Material Type Loan Limits policy table. See [List and modify loan and request limit entries](#).) However, if both material types are assigned to a “Media” group with a group limit of 5, and the patron’s code is specified for the Media group, the patron will be blocked if he already has 4 DVDs and 1 Blu-Ray disc or a similar combination.

If the individual material type limits and group limit conflict, the patron is blocked according to the group limit. For example, a “Media” material type group consisting of Video Cassette and DVD may be set to 0 for a patron code “Child,” while the individual Video and DVD limits are set to 5 each. In this case, the patron code Child would be blocked at 0—that is, not allowed to check out Videos or DVDs. If the patron code Child is removed from the group, the patron code Child may have up to 5 each of both Videos and DVDs (total of 10 items) because the system then uses the individual material type limits.

Limits on material type groups affect check-out from the staff client, including bulk check-out for Outreach Services or Borrow by Mail, Polaris ExpressCheck, and check-out from third-party workstations via SIP or NCIP, where block messages appear at check-out. The group limit is also checked when offline circulation transactions are uploaded, and an appropriate message is written to the offline upload report. The message includes the group name.

At normal check-out in the staff client, if the patron would exceed the group limit for the patron code, a block message appears. The staff member must have the Circulation permission **Override item limit blocks: Allow** to override the block and continue the transaction.

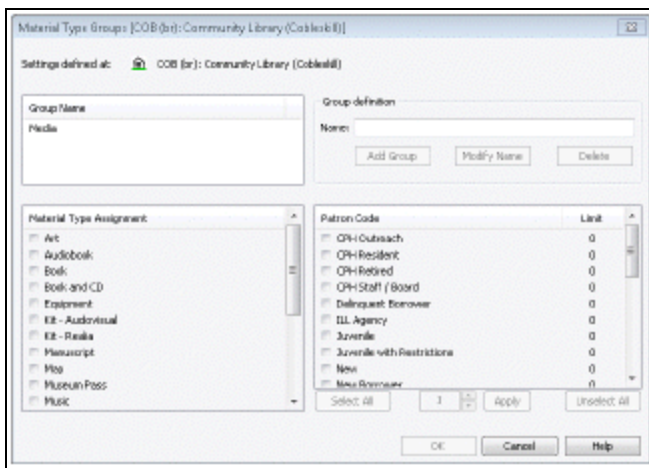
You can set up material type groups at the system, library, and branch levels. As with other loan limit blocks, the system uses the setting for the governing library for patron

blocks, which may be the transacting branch or the patron’s registered branch (set in the system-level Patron Services parameter **Consortium circulation**).

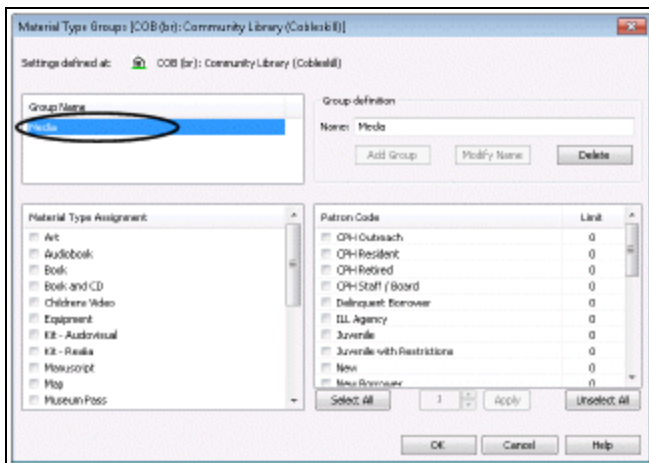
### Set up check-out limits by material type groups

To set up material type groups and set check-out limits for specific patron codes:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Material type groups**. The Material Type Groups dialog box opens.



3. Define a material type group:
  - a. Type a name for the group in the **Group definition** box.
  - b. Click **Add Group**. The new group appears in the Group name list at the top left portion of the dialog box.

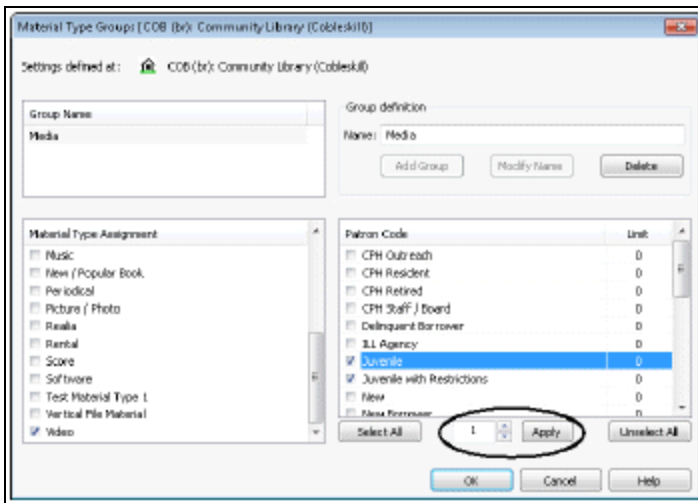


4. Assign material types to the group:
  - a. Select the new group name in the Group Name list.
  - b. In the Material Type Assignment list, check the material types that should be included in the group. Because a material type can belong to only one group, the list displays the material types not already assigned to another group for this organization.

**Note:**

You cannot add all material types to a group.

5. Assign patron codes and patron code limits to the group:
  - a. Select the group in the Group Name list.
  - b. In the Patron Code list, check the patron codes that should have a limit for this group. If several patron codes should have the same limit, select the appropriate codes. If all patron codes should have the same limit, click **Select All**.
  - c. In the number control, specify the number of items allowed for the selected patron codes, and click **Apply**.



- d. Repeat steps a and b to set different limits for different patron codes.
6. Click **OK** to save your group settings.

**Related Information**

- **Modify a material type group** - In the Material Type Groups dialog box, select the group in the Group Names list. You can then change the item material type and



patron code selections, and set new limits. To modify the group name, select the group in the Group Names list. The name appears in the **Name** box. Edit the name and click **Modify Name**.

- Delete a material type group - Select the group in the Group Names list. The name appears in the **Name** box. Click **Delete**. When you delete a material type group, the limits set for individual material types are applied at check-out.
- Patron codes - See [Defining Patron Codes](#).
- Material types - See [Defining Material Types](#).
- Governing library for patron blocks - The governing library for patron blocks determines which branch's material limit settings are used. See [Defining Circ and Request Limit Blocks](#).

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## Defining Patron-Initiated Circulation Blocks

If your library allows patrons to renew items from the PAC, or by telephone, or you provide integrated eContent circulation from PAC, you can set blocking conditions on these actions that are different from those that apply to renewals from the staff client. (EContent circulation is not supported in the staff client.) The PAC displays appropriate messages related to the blocks that you set.

### **Example:**

You allow PAC renewals on overdue items. There is a fine associated with an overdue item, but the fine does not cause the total charges on the patron's account to exceed a block threshold. When the patron attempts to renew the item, the PAC displays a message that the patron's account will be charged at renewal and requests confirmation to proceed with the renewal. If the patron chooses to proceed, the patron's account is charged the fine for the overdue item. If the patron cancels, the item is not renewed, and the account is charged when the item is returned.

You set these blocks with the Patron Services profile **Patron initiated circulation: Blocking conditions**. You can set the profile at the system, library, or branch level.

Patrons are blocked according to the setting for the governing library for patron blocks in the Consortium Circulation parameter. For more information, search Polaris help for "Consortium Circulation parameter."

### **Note:**

In addition to the blocking conditions you set for patron-initiated renewals and eContent circulation, PAC renewals are blocked when an item can fill an Active or Pending hold request, when the number of renewals (including the current renewal) would be greater than the renewal limit set in the item record, and if the PAC profile **Patron Access: Renewal** is set to block renewals if the due date would fall after the patron's registration has expired.

For more information on integrated eContent in Polaris, search Polaris help for "Managing EContent in the PAC."

Also see [Set blocks on patron-initiated circulation and eContent circulation.](#)

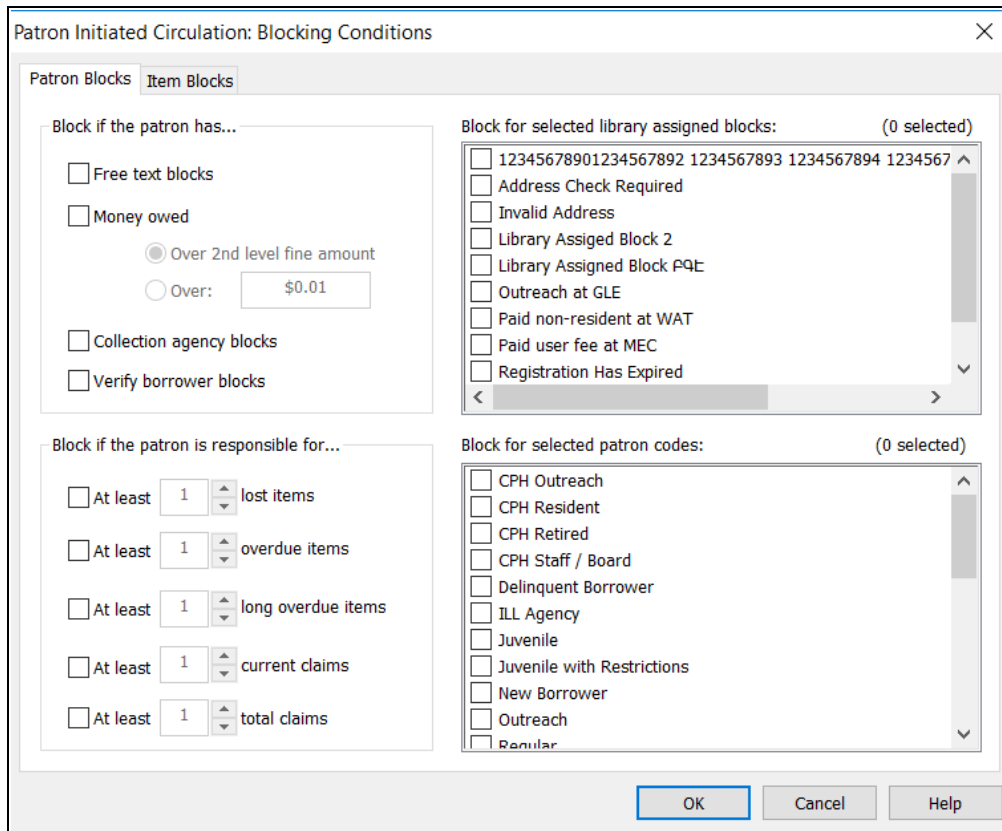
### Set Blocks on Patron-Initiated and eContent Circulation

**Note:**

Patrons are blocked according to the **Governing library for patron blocks** setting in the [Consortium Circulation](#) parameter.

To set patron and item blocks on eContent checkout and physical item renewals from PAC or by telephone:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Patron Services** tab in the details view.
2. Double-click **Patron initiated circulation: Blocking conditions**. The Patron Initiated Circulation Blocking Conditions dialog box opens with the Patron Blocks tab displayed.



3. On the **Patron Blocks** tab, select from the following options related to the patron record:

- **Free text blocks** - Blocks patrons whose records contain free-text blocks.
- **Money owed** - Blocks patrons whose total charges are greater than a specified amount. If you select **Money owed**, select either **Over 2nd level fine amount**, or select **Over** and type an amount.

**Note:**

The second level fine amount depends on the setting for the governing library for patron blocks. For information about setting the governing library, see [Set the governing library for circ transactions](#). For information about setting the second level fine amount, see [List and modify loan and request limit entries](#).

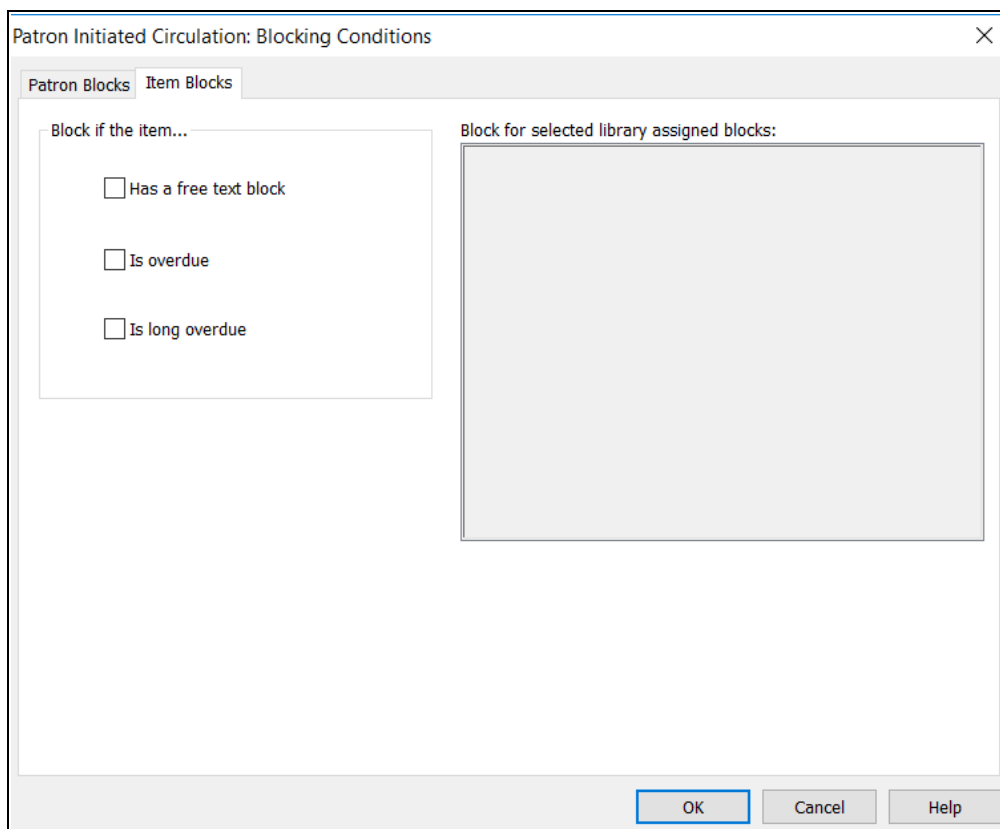
- **Collection agency blocks** - Blocks patrons whose accounts are in collection.
- **Verify borrower blocks** - Blocks patrons whose records require staff to verify the patron's identity.
- **At least.... lost items** - Blocks patrons who have one or more lost items. If you select this option, set the number of lost items that activates the block.
- **At least.... overdue items** - Blocks patrons who have one or more overdue items. If you select this option, set the number of overdue items that activates the block. All renewals and ebook circulations by the patron are blocked if the patron has the specified number of overdue items, even if other items are not overdue.
- **At least.... long overdue items** - Blocks patrons who have one or more long overdue items. If you select this option, set the number of long overdue items that activates the block. All renewals and ebook circulations by the patron are blocked if the patron has the specified number of long overdue items, even if other items are not overdue.

**Note:**

The period after which an overdue item changes to "long overdue" is set with the Patron Services parameter **Overdues: # of days until long overdue**. You can set the parameter at the system, library, or branch level.

- **At least.... current claims** - Blocks patrons who have one or more current claims that they have returned or never had items that are still shown as checked out. If you select this option, set the number of current claims that activates the block.

- **At least.... total claims** - Block patrons who have one or more total claims that they have returned or never had items that are still shown as checked out, regardless of whether or how the claims have been resolved. If you select this option, set the number of total claims that activates the block.
  - **Library-assigned blocks** - Select any library-assigned blocks that, when they appear in the patron record, should block PAC and telephone renewals and ebook circulation.
  - **Patron code blocks** - Select patron codes that should be blocked from making PAC and telephone renewals or checking out ebooks.
4. Click the **Item Blocks** tab. The Item Blocks tabbed page displays options that block renewals and ebook circulation according to conditions related to the item record.



5. Set the item record conditions that should block renewals:
- **Has a free text block** - Blocks renewals or (ebook circulation) on any item with a free-text block.

- **Is overdue** - Blocks renewal on any overdue item.

**Is long overdue** - Blocks renewal on any long-overdue items.

**Note:**

The period after which an overdue item changes to “long overdue” is set with the Patron Services parameter **Overdues: # of days until long overdue**. You can set the parameter at the system, library, or branch level.

- **Library-assigned blocks** - Select any library-assigned blocks for the item’s assigned branch that should block PAC and telephone renewals and ebook circulation when they appear in the item record.
6. Click **OK** in the dialog box. The Administration Explorer appears.
  7. Select **File > Save** to save any changes. The status bar indicates that the record is saved.

#### Related Information

- Patron blocks - Library-assigned blocks available for patron records are defined in the Patron Blocks policy table. Search the Polaris help for "Defining Patron Block Descriptions."
- Item blocks - Library-assigned blocks available for item records are defined in the Item Block Descriptions database table. See [Designating Floating Collections](#).
- Loan limit blocks, including fine limits - Loan, fine, and request limits are set in the Patron/Material Type Loan Limit Blocks policy table. See [Defining Loan and Request Limit Blocks](#).
- Other blocks on self-check circulation - For SIP self-check equipment, see [Set SIP self-check parameters](#). For Polaris ExpressCheck, see the *Polaris ExpressCheck Administration Guide*.

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## Setting Options for Associated Patrons

You can specify the following defaults for associated patrons using the Patron Services parameter, **Associated patron options**:

- The limit on the number of records that can be associated with other patron records.

- Whether the **Block me** option is selected by default.
- Whether the **Allow me** option is selected by default.

**Note:**

Your library may also set the PAC profile, **Patron access options**, so that patrons can view settings for associated patrons in their PAC accounts. See the Public Access Administration PDF Guide, [Set patron associations display in PAC](#).

See also:

- [Block and Allow Settings for Associated patrons](#)
- [Set Defaults for Associated Patron Settings](#)

### Block and Allow Settings for Associated Patrons

These settings appear in the Associations view of the Patron Status workform. Defaults for associated patrons are defined in Patron Services Administration. See: [Set defaults for associated patron settings](#).

**Notes:**

- Your library might set the PAC profile **Patron access options** so patrons can view settings for associated patrons in their PAC accounts, see [Set patron associations display in PAC](#).
- A patron cannot check out an ILL item on behalf of an associated patron; the requesting patron must check out the ILL item.

### Block Me Setting for Associated Patrons

When you create a new association for a patron (the parent or primary record), you can choose to block the parent or primary record at checkout and renewal when an associated secondary or child record is blocked at checkout.

- One primary record may be linked to multiple secondary records. If any of the secondary records are blocked, the primary record is blocked.
- One secondary record may be linked to multiple primary records. If the secondary record is blocked, all the linked primary records are blocked.

- Two primary records (Mom and Dad) may be linked to each other. If either is blocked, the other is blocked. Furthermore, a son may be linked to both Mom and Dad. Since all records are directly linked, if one is blocked, all will be blocked.
- Block checking is only one level deep. For example, instructor A and instructor C are both linked to student B. If B is blocked, A and C will both be blocked, because they each are one link away from B. But A will not be blocked if C is blocked because A is not directly linked to C.

### Allow Me Setting for Associated Patrons

- When you add an associated patron to a patron record and check the **Allow me to pick up holds for these patrons** checkbox, the primary patron whose record is displayed in the Patron Status workform can pick up held items for the associated patron. For primary patrons who are designated as allowed to pick up held items for other associated patrons, the following circulation processing occurs:
- The primary patron can use his or her own library card to check out the items held for other associated patrons.
  - When the primary patron checks out an item for an associated patron, the item is checked out to the current (primary) patron, not the associated patron for whom the hold was placed.
  - For offline checkouts, when the primary patron checks out an item for an associated patron, the following message is included in the offline processing report: **This item satisfies a hold request for associated patron [barcode, last name, first name, middle initial].**
  - When the primary patron checks out an item for an associated patron using Polaris ExpressCheck (or a self-check unit that communicates via SIP or NCIP), the item is checked out to the primary patron without an additional message.
  - The hold request is deleted from the associated patron's account (except in the case where the request status Out to patron is enabled in Polaris Administration).
  - The item history shows that the item was checked out to the current patron who is authorized to pick up holds for the associated patron.
  - The item is added to the primary patron's list of checked out items.
  - All renewals, notices, overdues etc. are linked to the patron who checked out the item for the associated patron.



## Staff Client Check-Out and Renewal Processing

- Associated patron blocking applies to check out from the Check Out workflow, renewal from the Check Out workflow, and renewal from the Patron Status workflow - Items Out view. If associated patron blocking has been enabled and at least one patron record associated with the transacting patron is blocked, a dialog box is displayed showing the linked patrons and the type of block. The same conditions that would block the associated record directly during checkout will block the primary patron record checkout. The block dialog box lists each block on a separate line. Each entry in the Associated Patrons list is a link to the associated patron's record.
- If one or more associated patrons are blocked for any reason that requires an override, both the permission to override the specific block and the permission **Override associated patron block: Allow** are required to continue check out. Transaction 9001 logs supervisor overrides for the **Override associated patron block** permission override

## Adding and Editing Associations

Staff members use the Patron Status workflow - Associations view to add or remove associations. When the staff member adds an association to a patron record, the Add Association dialog box includes the option **Block me if these patron records are blocked**. The open patron record is the primary record. When **Block me** is checked, it will be blocked when the newly associated record is blocked. The Patron Status workflow - Associations view displays the list of associated patrons. A column indicates a blocking relationship. The Patron Status workflow also offers a Tools menu option, **Check Associated Patron Blocks**. Staff can select this option to display a list of the blocks on the associated patrons' records.

- Merging Patron Records - The "winning" patron record retains any associated patron links it already has, but the winning record is not affected by any links in the losing record.
- Deleting Patron Records - When a patron record with associations is deleted, the link is removed from the associated records. A warning message displays with a breakable link, but there is no additional message if the linked patrons are blocked.

## Offline Checkout

If a blocked associated patron is detected when offline check-out transactions are uploaded, a message is written to the upload log file. The message includes the

associated patron name and barcode, and the block text. If the patron is blocked for more than one reason, each block is listed; if more than one patron is blocked, each is listed in a separate message.

## PAC and Polaris ExpressCheck Check-out and Renewal

- From PAC, the primary (parent) record is stopped from renewal if an associated patron record has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron record has exceeded the maximum overdue item limit as determined by the governing library for patron blocks.
- In Polaris ExpressCheck, the primary (parent) record is also stopped from checking out and renewal if an associated patron record has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron record has exceeded the maximum overdue item limit as determined by the governing library for patron blocks. A message is displayed, which can be edited in Polaris Language Editor (WebAdmin). For more information, see WebAdmin online help. The WebAdmin string IDs are as follows:
  - Default header text - **Polaris ExpressCheck - Associated Patron Blocks**  
String ID **EC\_TEXT\_COURTESY\_ASSOCIATED\_ACCTBLOCKED\_TITLE**
  - Default message text - **One or more records linked to your library registration is blocked. Click Show Details to see more information.**  
String ID **EC\_TEXT\_COURTESY\_ASSOCIATED\_ACCTBLOCKED\_MSG**

## SIP Self-Check

A setting in the SelfCheck Unit parameter **Patron blocks** controls whether a patron is blocked at checkout when an associated patron has exceeded the 2nd level fine amount, or has exceeded the maximum overdue item limit as determined by the governing library for patron blocks. The parameter is available at the system, library, or branch level, and is set to **No** (do not block) by default. The system uses the setting of the workstation's branch. See [Set SIP self-check parameters](#).

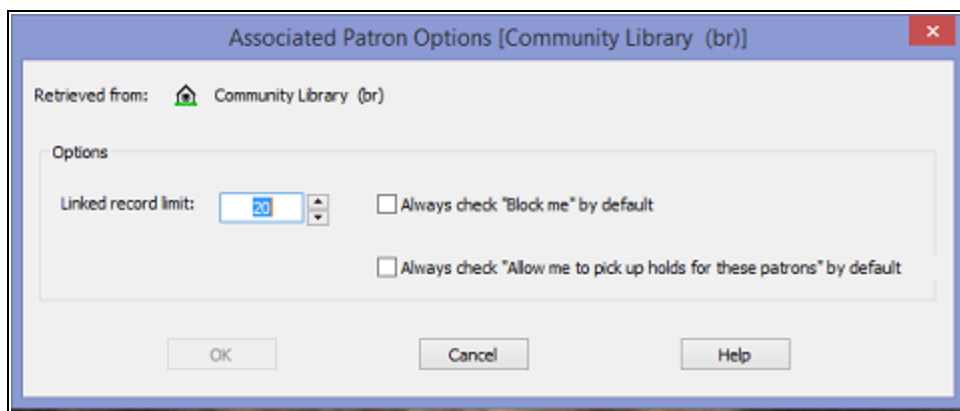
## Set Defaults for Associated Patron Settings

You can use the **Associated patron options** parameter to set the maximum number of linked records, specify whether patrons are blocked when their associated patrons are blocked, and whether patrons are allowed to pick up and check out items that are held

for their associated patrons. For information on how these settings affect circulation, see [Block and Allow settings for associated patrons](#).

To specify your library organization's default settings for associated patrons:

1. Select Administration, Explorer, and select the system, library, or branch organization for which you want to specify the default setting.
2. Select **Parameters**, and select the Patron Services tab. The patron services parameters are listed in the details view.
3. Double-click the **Associated patron options** parameter to open the dialog box.



4. Select a number in the Linked record limit box to specify the maximum number of associated patrons that can be linked.
5. Select (or clear) the **Always check "Block me" by default** to block patrons if their associated patrons are blocked.
6. Select (or clear) the **Always check 'Allow me to pick up holds for these patrons' by default** checkbox.

If this box is checked, the **Allow me to pick up holds for these patrons** box is checked by default on the Add Associations and Edit Associations dialog boxes. Staff members with the appropriate permissions can change the setting when adding or editing a patron association.

## Setting Up Floating Collections

Floating collections processing is the ability to allow certain items to remain at the branch where they were last checked in. If an item is called to another branch, for example to fill a hold request, the item will stay at that branch when it is returned. The items move among branches as they are used, not according to a rotation schedule. Floating collections allow high-demand items to remain at high-traffic organizations, and collection contents to change with demand. They also reduce the cost of returning materials to a single starting point after each use at another branch. You can check in an item at branch B that belongs to branch A and, rather than putting the item in transit back to A, let it remain at B. The item's Assigned Branch changes from branch A to branch B, and the reassigned item takes on branch B's circulation parameters.

Floating collection functions are optional. If your system consists of organizations that do their own purchasing and processing, and item ownership is important to each organization, you may not want to implement floating collections. If your system does central purchasing and processing, then distributes items to branch organizations, you may find floating collections very useful.

Some libraries allow nearly all items to float. Others exert more control over what items may float and to what locations. You can configure floating options at the branch level, so that each "home" branch can determine if any of its items are allowed to float and to which branches. You can specify limits by the number of items attached to the same title (with the same material type) that can float into a collection, or by the number of items in each collection.

Individual items can be designated as exempt from floating. The item record includes a **Do not float** option that can be set manually for an individual item, through an item template, or by bulk change to an item record set. ILL items and reserve items with a reserve status of On Reserve or Permanent Reserve never float.

See also:

- [Floating Collections Processing Overview](#)
- [Designating Floating Collections](#)
- [Setting Home and Receiving Branch Policies](#)

- [Setting Branch Parameters](#)
- [Floating Collections: Setup Examples](#)
- [Floating Collections: Troubleshooting](#)
- [Floating Collections Reports](#)

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## Floating Collections Processing Overview

When you set up floating collections, you first determine what collections are eligible to float for which home branches. The home branch's policies determine if an item from the eligible collection should float. For each branch that enables floating collections, you set the following additional limits:

- Which branches can receive the home branch's floating items
- Which material types may not float regardless of whether the item belongs to an eligible collection.
- Whether limits are applied based on the number of items of the same material type attached to the same bibliographic record, or by the number of items in a collection.

If floating is enabled for an item's home branch, when the item is checked in at a receiving branch, the system checks the limits. If all conditions permit floating, the item is checked in at the new branch and the item's assigned branch automatically changes to the new branch.

**Note:**

If floating collections are not used, the item's home branch and assigned branch are typically the same. The home branch value is used only for floating collections and does not affect any other item processing.

### Cooperative Considerations for Floating Collections

Libraries and branches that participate in floating collections may want to have matching, reciprocal policies to help maintain a balance of items. If the participating organizations will float many items, it is a good practice to standardize the classification system and collections.

## Circulation Processing for Floating Items

Floating collection processing takes place at check in. The system check for floating eligibility and the migration of the item to its new assigned branch are nearly the last steps in the check-in process. The process happens automatically; no message is displayed to the staff member when the item floats to its new assigned branch.

- Fines - All fines are calculated before floating, according to the most recent assigned branch for the item.
- Holds - All holds are filled before the floating check. The hold is filled according to the policies of the most recent assigned branch. If the item fills a hold, it does not float to the new branch; it goes to the pick-up branch.
- Blocks - Checked according to the most recent assigned branch, before the floating check.
- Cancelling check in - The option to cancel a check in occurs before the check for floating. Cancelling check-in retains the original Assigned Branch of the item.
- Lost or Lost-and-Paid items - Lost recovery options, including the lost recovery dialog, are invoked according to the rules of the receiving branch, regardless of whether the item floats to that branch or not.
- Claimed items - Floating has no impact. The patron record is updated normally when the item checks in, regardless of floating.
- Prompt for In-transit - If an item qualifies for floating but does not migrate to the receiving branch (for example, the item is over a specified material type or collection limit for the receiving branch), you can have the system display a prompt to accept an item over the limit anyway (see [Set parameters and profiles for floating collections](#)). If you suppress the prompt from display, an in-transit prompt is displayed instead, and the staff member can put the item in-transit or check it in (the assigned branch and other parameters do not change to those of the receiving branch).

If the item does not qualify for floating, the system displays or does not display the in-transit prompt according to the Polaris Administration setting for the receiving branch. If the prompt displays and the option to put the item in-transit is not selected, the item is checked in at the receiving branch but the assigned branch and other parameters do not change to those of the receiving branch.

- Shelving Status - The assignment of a shelving status occurs after the item becomes In at the receiving branch. The behavior is not affected by floating.

- In-to-In - If the assigned branch is the same as the check-in branch, the item goes from In to In. If an item status is In and the Assigned Branch is different from the receiving branch, the transaction is treated as a new check-in.
- Bulk check in - If an item successfully floats, the item becomes In at the new assigned branch. No additional messages display.
- Check in from item record - Same processing as normal check in from the Check In workflow.
- OTF (on-the fly) items - These behave as normal items. They may float as long as they fit the rules established for floating.
- Items that do not float - ILL items and reserve items with a reserve status of On Reserve or Permanent Reserve never float.
- Offline check in - Floating checks are performed as part of the offline upload. There are no additional messages in the upload log resulting from floating. If an item that would check in at the receiving branch (per the floating item option of the Home Branch) is checked in offline, the Assigned Branch field in the item record will be updated when the transactions are uploaded. No message is written to the upload transaction file. If an item that would be placed in-transit from the receiving branch is checked in offline, the item status is set to In-Transit, and a message is written to the offline upload transaction file.
- SIP check in - If an item that would check in at the receiving branch (per the floating item option of the Home Branch) is checked in at a SIP workstation, the item floats to the receiving branch like the normal check-in. The Assigned Branch field in the item record is updated accordingly.
- Transactions - For check in, the subtype **Item float branchID** shows the branch ID of the receiving branch if an item has floated there. Check-out and check-in transactions include the item's home branch.

### Possible Issues

- If the assigned branch of a floating item is changed manually or by bulk change to a branch that is not on the home branch's list of receiving branches, the item will obey the circulation parameters of its new assigned branch, unless it is checked in at a branch controlled by the home branch.
- If the floating option is disabled for the home branch, items will stay at their last assigned branch. Reporting is available to identify items where the Home branch and Assigned branch differ. See [Floating Collections Reports](#).

- If you choose to allow serial items to float, the PAC compressed holdings statement may be inaccurate. You can minimize the difficulty by restricting a serials collection or material type from floating, or by creating serial item records with a template in which **Do Not Float** is checked.

### Collection Agency Processing and Floating Items

If several branches report to a collection agency and the reporting is set by item's branch, remember that floating items can change branch. For example, if a patron account is submitted to a collection agency for a charge on Item X from Branch A and then that item floats to Branch C, in subsequent reporting, the patron's account will be reported from Branch C. The patron will not have multiple charges, but the amount owed for that item is now associated with C. The patron's account is no longer listed on the Update Report for Branch A; it appears on the next Submission Report for Branch C. Subsequent payments and other activity will appear for Branch C unless the item moves again.

### Item Record Updates for Floating Items

When a floating item is checked in at the receiving branch, the item record fields are updated as follows:

- Assigned branch - Changes to the branch of the check-in workstation.
- Collection - If both the home branch and receiving branch are assigned to the collection, that collection is displayed. If the receiving branch is not assigned to the collection, or if there is no collection indicated in the item record, the behavior depends on Polaris Administration settings. See [Cooperative Considerations for Floating Collections](#).
- Loan Period - The Loan Period defined for the loan period code of the receiving branch.
- Fine Code - The Fine Code defined for the receiving branch.

**Note:**

Loan Period Codes and Fine Codes can be defined at the system level so that all participating branches share these settings. Also, you can use the Patron Services Parameter **Fine and Loan period defaults** to set default values to apply when the loan period code and fine code are not shared by the home branch and receiving branch.



- Shelf Location - The program attempts a character-for-character match on the field. If the fields match, the value remains. If the fields do not match, the value is set to **None**.
- Stat code - The program attempts a character-for-character match on the field. If the fields match, the value remains. If the fields do not match, the value is set to **None**.
- Library-assigned blocks - The program attempts a character-for-character match on the field. If the fields match, the value remains. If the fields do not match, the value is set to **None**.
- Free text block - The text is not altered or deleted. It appears in the item record after check in.

The Item Record workform - Circulation History view shows the item's Home branch, the **Do not float** option, and the circulation history of the item as the item moves from branch to branch. (You can also see the circulation history for floating items linked to the same bibliographic record by selecting **Tools, Show Usage Statistics** in the Bibliographic Record workform.) Two transactions appear each time an item floats, one for the check in, and one for the change in assigned branch due to floating.

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## Designating Floating Collections

Polaris collection records name collections, track which branches use the collections, and designate what collections are potentially eligible to float from which branches. See also: [Designate collections as eligible to float](#).

Consider setting up these collections so that all branches that participate in the floating arrangement use the collections; otherwise, you will need to set parameters to deal with the case where an item floats to a receiving branch that does not share the item's collection (see [Set parameters and profiles for floating collections](#)).

### Designate collections as eligible to float

To specify what collections are potentially eligible to float from which branches:

**Note:**

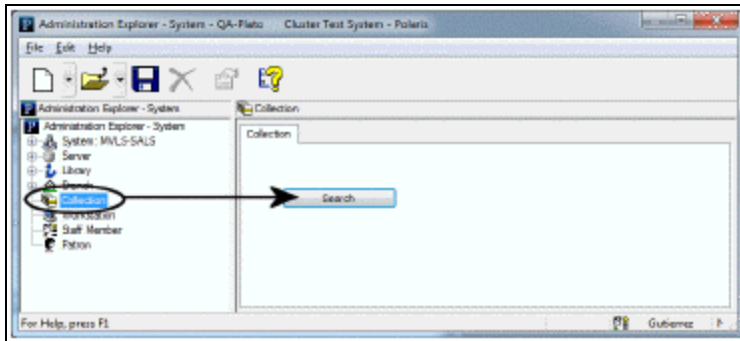
For general information about setting up and editing collections, see the Polaris Administration PDF Guide, Working with Collections topic.

1. From the Polaris Shortcut bar, select **Administration, Explorer, System**. The Administration Explorer opens.

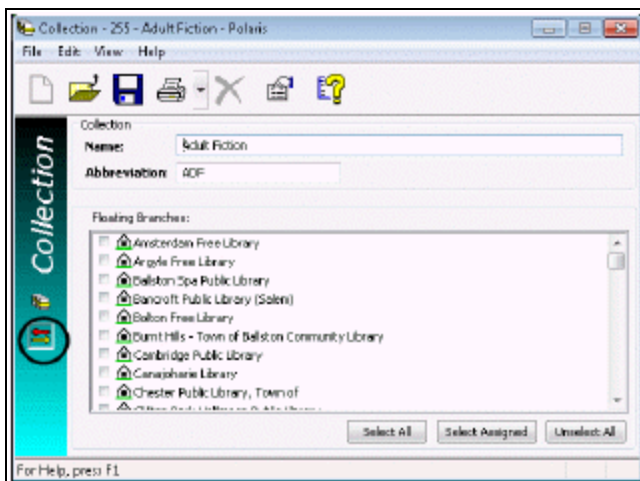
**Tip:**

To work with a specific collection, you can use the Polaris Find Tool to search for and open the collection record. Select **Administration, Collection** on the Polaris Shortcut Bar. To work with multiple collections, use the Administration Explorer.

2. Click **Collection** in the Administration Explorer tree view. A search button appears in the details view of the Explorer.



3. Click **Search** to display the Polaris Find Tool.
4. Search for the collections with which you wish to work.
5. Select collections from the Find Tool results list to list in the Administration Explorer. You can use the **CTRL** or **SHIFT** key to select multiple collections.
6. Right-click in the results list, and choose **Select** from the context menu. The collections are listed in the Explorer.
7. Right-click the collection in the Administration Explorer, and select **Edit** from the context menu. The Collection workform opens.
8. Select **View > Floating branches** The Collection workform - Floating branches view opens. The workform lists all the branches in the system.

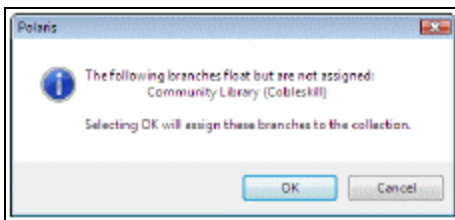


9. Select the potential home branches for this collection (those that may allow items from this collection to float), using one of these methods:

- Click **Select All** to select all the listed branches.
- Click **Select Assigned** to select all the branches that have been assigned to this collection. This option makes the floating branches selections the same as the assigned branches selections.
- Select the checkboxes by individual branches.

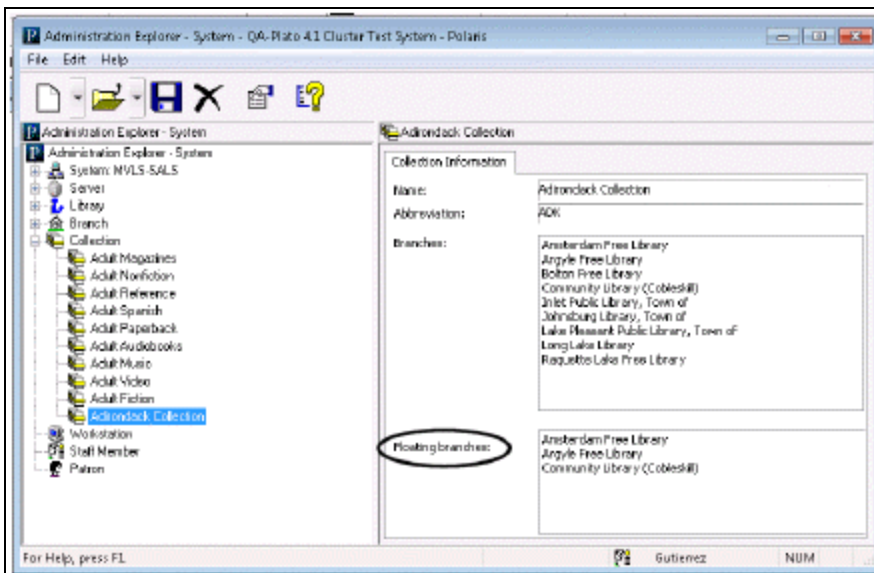
10. Select **File > Save**.

If you have selected a branch to which the collection has not been assigned, a message asks if you want to assign the branch to the collection or cancel your work.



11. Click **OK** to assign the branch to the collection and continue to save your work.

When floating branches have been assigned, the Collection property sheet in Polaris Administration shows what branches have been assigned for floating.



12. Set policies for the individual home branches that will allow collections to float. See [Setting Home and Receiving Branch Policies](#).

13. Set individual branch parameters for floating collections. See [Setting Branch Parameters](#).

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## Setting Home and Receiving Branch Policies

The following policy tables control floating item policies:

- **Floating: To Branch** - This table sets the possible receiving branches for items that are allowed to float. The Home branch designated in the item record determines the branches to which its items may float. See [Set the branches to receive floating items](#).
- **Floating: Material Types** - Use this table to set the material types that should not float, even if the items belong to a floating collection. The Home branch designated in the item record determines the material types that should not float. See [Set the material types that cannot float](#).
- **Floating: Material Type Limits** - A busy branch that receives many floating items may be at risk of being overwhelmed by popular items, running short of shelf space, or of absorbing the bulk of available items. Use this table to set how many items linked to the same bibliographic record the receiving branch is willing to accept. The receiving branch determines separate limits for In items attached to the same title and items of any circulation status attached to the same title. See [Limit the floating items for the same title and material type](#).
- **Floating: Collection Limits** - Use this table to set limits on the number of items a branch can receive into each of its floating collections. See [Limit the number of floating items a branch can receive for a collection](#).

### Set the branches to receive floating items

The home branch decides which branches may receive its floating items.

To set the receiving branches:

**Note:**


You need the system-level System Administration permission **Modify floating to branch table: Allow** to do this procedure.

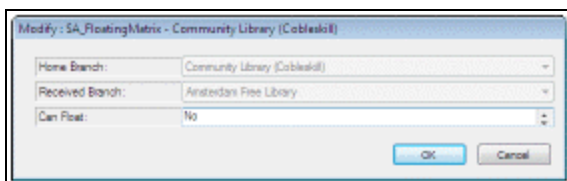
1. In the Administration Explorer tree view, open the **Policy Tables** folder for the home branch, and select **Floating: To Branch**. The Floating: To Branch table is

displayed in the details view.

**Note:**

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

- In the Received Branch list, select a branch to designate as a branch that can receive items from the home branch. Press **CTRL+click** or **SHIFT+click** to select multiple branches. By default, **Can float** for each possible Received branch is set to **No**.
- Click . The Modify box opens.



- Change **Can Float** to **Yes**, and click **OK**.
- Repeat steps 2-4 to change additional “float to” (Received) branches.

### Set the material types that cannot float

Even if an item belongs to a collection that a home branch allows to float, the home branch can prevent certain material types from floating.

To set the material types that the home branch is not willing to allow to float, even if the items belong to a collection that is allowed to float:


**Note:**

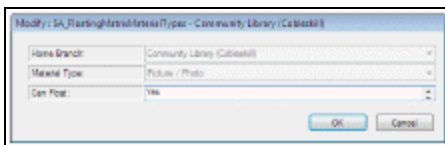
You need the system-level System Administration permission **Modify floating material types table: Allow** to do this procedure.

- In the Administration Explorer tree view, open the **Policy Tables** folder for the home branch, and select **Floating: Material Types**. The Floating: Material Types table is displayed in the details view.

**Note:**

To better manage memory, a program-defined row limit determines if this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

2. In the Material Type list, select a material type that should not float from the home branch. Press **CTRL+click** or **SHIFT+click** to select multiple material types. By default, **Can float** for each material type is set to **Yes**.
3. Click . The Modify box opens.



4. Change **Can Float** to **No**, and click **OK**.
5. Repeat steps 2-4 to designate additional material types that should not float.

### Limit the floating items for the same title and material type

You can limit the number of items attached to the same bibliographic record that the receiving branch will accept. For example, a limit of 20 on material type DVD indicates that the receiving branch will not accept more than 20 DVD copies of any given title. In determining how many items to bring in, the system counts how many of the items are immediately available (In), as well as how many of the items have floated to the receiving branch regardless of their current circulation status.

To set limits on items with the same material type linked to the same bibliographic record:

**Note:**

You need the system-level System Administration permission **Modify floating material type limits table: Allow** to do this procedure.


1. In the Administration Explorer tree view, select the receiving branch (the branch to which items will float).

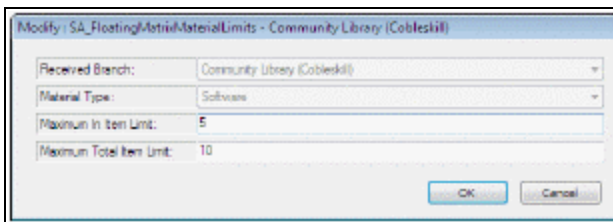


- Open the **Policy Tables** folder for the receiving branch, and select **Floating: Material Type Limits**. The Floating: Material Type Limits table is displayed in the details view.

**Note:**

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

- In the Material Type list, select the material type for which you want to change the receiving branch's limits. By default, the maximum number of In items attached to the same bibliographic record for each material type is set to **5**. The default maximum number of items of any circulation status is **10**.
- Click . The Modify box opens.



Received Branch:	Community Library (Cobleskill)
Material Type:	Software
Maximum In Item Limit:	5
Maximum Total Item Limit:	10

- Change the limit settings as appropriate, and click **OK**. The Maximum In Item Limit can be 0 or greater. The Maximum Total Item Limit must be 1 or greater.

**Examples:**

Due to normal circulation processes, you may end up with more floating items than your on-shelf (In) item limit. For example, your In Item Limit is set to 5. You have 4 items on the shelf, and you check another item in. You have reached the limit. Then you check out 2 of the items. Another item comes in and successfully floats to your branch because you have 2 less than your In limit. The two checked out items come back. All items are on the shelf, and they total to one more than the limit. You can manipulate the limit settings depending on the results you want:

– To closely enforce an on-shelf (In) limit, set the In Item Limit to any value greater than 1, and set the Total Item Limit to an equal or slightly greater value. For example, set the In Item Limit to 10 and the Total Item Limit to 12. The on-shelf limit is enforced but the total items may grow somewhat over the on-shelf limit. The Total Item Limit setting helps to control the expansion.

– To loosely enforce an on-shelf limit, set the In Item Limit to any value greater than 1, and set the Total Item Limit to a value much greater than the In item Limit. The on-shelf limit is enforced but the total items may grow over the on-shelf limit.

– To enforce only a total limit, set the In Item Limit to any value greater than 2, and set the Total Item Limit to any value equal or less than the In Item Limit (other than 1). For example, set the In Item Limit to 50 and the Total Item Limit to 10. This essentially overrides the on-shelf limit.

– To not impose any limits, set both limits to very high values (such as 99). This essentially turns off checking.

6. Repeat steps 2-4 for each material type for which you want to change the limits.

#### **Related Information**

You can display a prompt when checking in a floating item that would exceed the material type limits. See [Set parameters and profiles for floating collections](#).

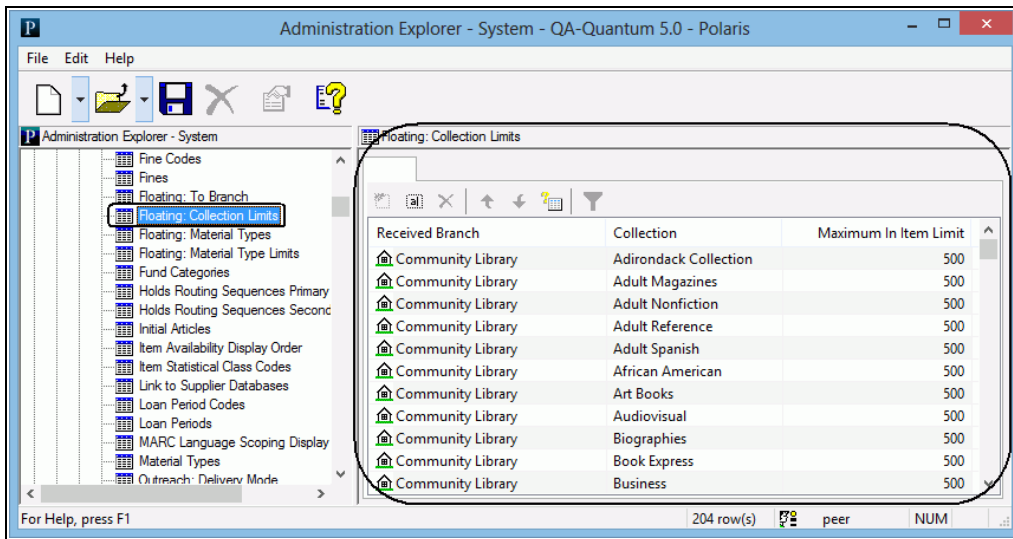
#### **Limit the number of floating items a branch can receive for a collection**


To set limits on the number of items that can be checked in for a floating collection:

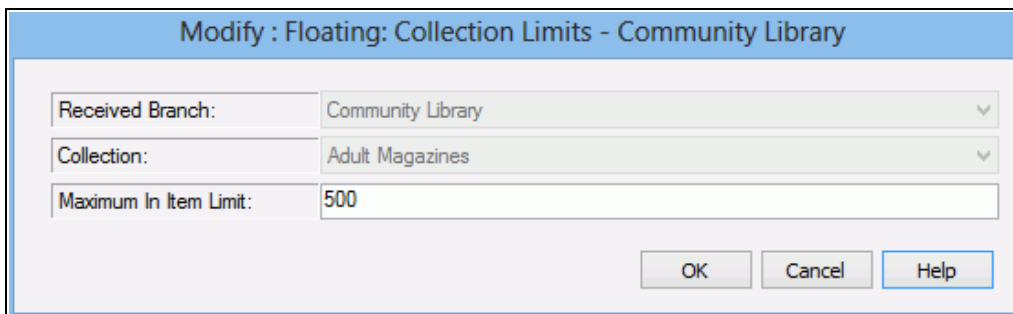
##### **Note:**

The items In-transit to the receiving branch, as well as the In items, are counted towards the maximum items in a collection.

1. In the Administration Explorer, select the **System, Library or Branch**.
2. Open the **Policy Tables** folder, and select **Floating: Collection Limits**. The Floating: Collection Limits table is displayed in the details view.



3. Select the collection for which you want to change the receiving branch's limits.
4. Click . The Modify box opens.



5. Change the collection limit as appropriate, and click **OK**. The Modify box closes.

**Note:**

Items that are In-transit to the receiving branch are counted as well as items that are In.

6. Select **File > Save** to save the policy table.

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## Setting Branch Parameters for Floating Collections

You can set the appropriate Patron Services parameters and Cataloging profiles at the system, library, or branch level to fine-tune how floating collections work among the branches that participate. In addition, the Patron Services parameter **Floating enabled** controls whether a branch uses floating collections functionality at all. You may wish to set this parameter last, after reviewing all your settings for floating collections.

Before you fine-tune and enable floating collections, do the following:

- Specify which collections are potentially eligible to float. See [Designating Floating Collections](#).
- For each home branch, set the branches that can receive the home branch's floating items. See [Set the branches to receive floating items](#).
- For each home branch, set the specific material types that cannot float. See [Set the material types that cannot float](#).
- For each receiving branch, set the limits for In items attached to the same title and items of any circulation status attached to the same title. See [Limit the floating items for the same title a branch can receive](#).
- For each receiving branch, set the limits for the number of In items with a Final status that can be in each collection. See [Limit the number of floating items a branch can receive for a collection](#).

### Set parameters and profiles for floating collections

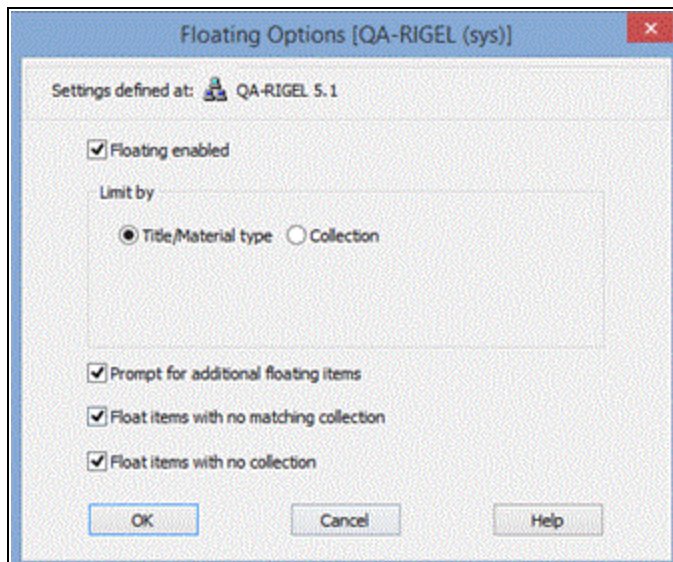
At the System level, your library can use the Floating Options parameter to define floating limits by the maximum number of In items attached to the same bibliographic record for each material type, or by the number of In and In-transit items in a collection. If **Title/Material type** is selected, the limits are set for the receiving branches using the Floating: Material Type Limits policy table. If **Collection** is selected, the limits are set for the receiving branches using the Floating: Collection Limits policy table.

If the **Limit by Collection** option is selected on the Floating Options dialog box, you can also select **Load balancing** (at the System level only). When load balancing is enabled, and an item cannot float into the receiving branch because it would exceed that

branch's collection limit, the system checks all eligible receiving branches that participate in floating collections to find the branch with the fewest In and In-transit items (with a final status) in comparison to the collection limit. The item will float to the branch that has the lowest ratio of the number of items to the collection limit. If no eligible branches are found, or two or more branches' collections have the same ratio of the number of In and In-transit items to the collection limit, the item is returned to its assigned branch.

To set floating collections options:

1. In the Administration Explorer tree view, open the **Parameters** folder at the System, Library, or Branch level and select the **Patron Services** tab.
2. Select **Floating Options**. The Floating Options dialog box opens.



3. Select the **Floating enabled** checkbox.

**Important:**

If this parameter is set to **No** for a branch, items will not float to the branch even if the branch is selected as a receiving branch in the home branch's Float: To Branch policy table. A home branch must also set this parameter to **Yes**; otherwise, no items will float even if a collection is designated as floating for the branch in the Collection workflow.

4. (System level only) Under **Limit by**, select one of these options: **Title/Material type** or **Collection**.

- a. If **Title/Material** type is selected, limits are applied according to the material type limits the participating branches specify in the policy table (see [Limit the floating items for the same title and material type](#)).
  - b. If **Collection** is selected, select the default limit on the number of items for all participating branches' collections. Branches can change this limit using the policy table (see [Limit the number of floating items a branch can receive for a collection](#)). If **Collection** is selected, you can select **Load balancing**, but only the **Prompt for additional floating items** checkbox options is available when **Load balancing** is selected.
  - c. If either **Limit by** option is selected, you can select or clear the following checkboxes.
    - Prompt for additional floating items
    - Float items with no matching collection (not available with Load Balancing)
    - Float items with no collection (not available with Load Balancing)
5. If you want items to float even if the receiving branch has no matching collection, set **Floating: Float items with no matching collection** to **Yes**. (The default setting is **No**.)

When this parameter is set to **Yes** and such an item is checked in at the receiving branch, the item's Assigned Collection is reset to blank (none assigned) for the new Assigned Branch.

6. If you want items with no assigned collection to float, set **Floating: Items with blank Assigned Collection can float** to **Yes**. (The default setting is **No**.)

**Note:**

If you want only items with no assigned collection to float, do not designate any collections as eligible to float. Select receiving branches for the home branch, and set **Floating: Items with blank Assigned Collection can float** to **Yes** for the home branch. Then enable floating for both the home branch and the receiving branches.

7. To display a prompt at check in when material or collection limits would be exceeded for the receiving branch, set **Floating: Prompt for additional floating items** to **Yes**. (The default setting is **No**.) The effect of the staff member's response to the prompt depends on the **Limit by** setting as follows:
  - **Limit by Title/Material Type or Limit by Collection (no load balancing)** - When this prompt option is set to **Yes**, and a floating item is checked in, a prompt appears if

the item would exceed the maximum limit for items attached to the same bibliographic record (see [Limit the floating items for the same title a branch can receive](#)) or collection limit (see [Limit the number of floating items a branch can receive for a collection](#)). The staff member can override the limit and accept the item. If you leave this parameter set to **No** and an item is over the limit, an in-transit prompt is displayed instead, and the staff member can put the item in-transit or check it in (the assigned branch and other parameters do not change to those of the receiving branch in this case).

- **Limit by Collection with load balancing** - When this prompt option is set to **Yes**, and a floating item is checked in, a prompt appears if the item would exceed the branch's collection limit. The staff member can override the limit and check in the item. If the staff member selects **No**, the item floats out to the branch with the lowest ratio of the number of items to collection limit.
8. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Cataloging** tabbed page in the details view.
  9. To display a warning message during item bulk change when the items' assigned and home branches are changed, set **Item bulk change: Warning if changing Assigned or Home branch** to **Yes**. (The default value is **No**.)

If you set this parameter to **Yes**, when the Assigned and Home branches are changed so that the two values are not the same, the warning message is displayed. You can continue or cancel to stop and reset the values. When the parameter is set to **No**, no warning message is displayed and the change continues.

10. To display a message when an individual item's assigned or home branch is changed, set **Item Records: Warning if changing Assigned or Home branch** to **Yes**. (The default value is **No**.)

If you set this parameter to **Yes**, when either the Assigned or Home branch is changed so that the two values are not the same, the message appears on the bulk change summary window. When the parameter is set to **No**, no message is displayed.

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## Floating Collections: Setup Examples

Here are some setup examples to help you decide how to set up floating collections processing for your system.

- All items in a collection can float - Let any items from the Biographies collection at Community Library float to branches A, X and Z:
  - In the Collections workflow for the Biographies collection, select **Community Library** on the Floating branches view. This indicates that Community Library as the home branch will let items in this collection float. Refer to [Designate collections as eligible to float](#).
  - In the Floating: To Branch policy table for Community Library, set Received branches A, X, Z to **Yes**. This indicates that Community Library allows items to float to these branches. Refer to [Set the branches to receive floating items](#).
  - In the Floating: Material Type Limits policy tables for branches A, X, and Z, set the limits for items permitted to float to each receiving branch. Note that these limits are not set in the policy table for Community Library, but in the policy tables of the branches that will receive the items. Refer to [Limit the floating items for the same title a branch can receive](#).
  - Set the Patron Services parameter **Floating enabled** to **Yes** for the home branch and the receiving branches.
- All items in a collection can float except a certain material type - Let all items from Community Library's Biographies Collection except Reference material float to any branch:
  - In the Collections workflow for the Biographies collection, select **Community Library** on the Floating branches view. This indicates that Community Library will let items in this collection float. Refer to [Designate collections as eligible to float](#).
  - In the Floating: To Branch policy table for Community Library, set all Received branches to **Yes**. Refer to [Set the branches to receive floating items](#).
  - In the Floating: Material Types policy table for Community Library, set the **Reference** material type to **No**. Refer to [Set the material types that cannot float](#).
  - In the Floating: Material Type Limits policy tables for all receiving branches, set the limits for items permitted to float to each branch. Refer to [Limit the floating items for the same title a branch can receive](#).
  - Set the Patron Services parameter **Floating enabled** to **Yes** for the home branch and the receiving branches.



- All items of a certain material type can float - Let any item of material type DVD-NonFiction float from Community Library to any branch:
  - From the Collections workflow for every collection, select **Community Library** on the Floating branches view. This indicates that Community Library will let items in every collection float. Refer to [Designate collections as eligible to float](#).
  - In the Floating: To Branch policy table for Community Library, set all Received branches to **Yes**. Refer to [Set the branches to receive floating items](#).
  - In the Floating: Material Types policy table for Community Library, set any material types that should not float to **No**. See [Set the material types that cannot float](#).
  - In the Floating: Material Type Limits policy tables for all receiving branches, set the limits for DVD-NonFiction items permitted to float to each receiving branch. Refer to [Limit the floating items for the same title a branch can receive](#).
  - Set the Patron Services parameter **Floating enabled** to **Yes** for the home branch and the receiving branches.
- Only items with no collection can float - Let only items with no assigned collection float from Community Library to any branch:
  - In the Collections workflow for every collection, be sure **Community Library** is not checked in the Floating branches view.
  - In the Floating: To Branch policy table for Community Library, set all Received branches to **Yes**. Refer to [Set the branches to receive floating items](#).
  - In the Floating: Material Types policy table for Community Library, set any material types that should not float to **No**. See [Set the material types that cannot float](#).
  - In the Floating: Material Type Limits policy tables for all receiving branches, set the limits for items permitted to float to each receiving branch. Refer to [Limit the floating items for the same title a branch can receive](#).
  - Set the Patron Services parameter **Floating: Items with blank Assigned Collection can float** to **Yes** for Community Library. Refer to [Set parameters and profiles for floating collections](#).

- Set the Patron Services parameter **Floating enabled** to **Yes** for the home branch and the receiving branches.

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## Floating Collections: Troubleshooting

You have designated floating collections and assigned branches to the collections. For each home branch, you have set float-to branches and determined which material types can float. Now you have scanned an item from another branch and the item went to In-transit instead of floating to your branch. What happened?

- Check the item's material type. Is this a material type that is set to float?
- Check your limits by material type for the receiving branch. Is this item over the limit?
- Check your limits by collection for the receiving branch. Is this item over the limit?
- Check the Floating parameters (**Parameters, Patron Services**) for the receiving branch. Has floating been enabled?
- Does the item have an assigned collection? If not, check the setting for the Patron Services parameter **Floating: Items with blank Assigned Collection can float**.
- Does the assigned collection of the incoming item match a collection used by the receiving branch? If not, check the setting for the Patron Services parameter **Floating: Float Items with no matching collection**.

---

## Floating Collections Reports

Floating collections reports are available to help you gather statistics about floating items in your system, and to summarize home branch settings. To access these reports, select **Utilities > Reports and Notices > Circulation**.

- For information on generating reports, search Polaris help for "Using Polaris Standard Reports."
- For detailed descriptions of specific reports, search Polaris help for "Circulation Reports."

## Managing Notification

Your library can send a variety of notices to patrons, staff, and third-party vendors. Polaris Administration settings determine which types of notices are automatically generated and how they are delivered. You can customize many notice elements in Polaris Administration, and use Polaris WebAdmin (Language Editor) to [customize notice text](#). In addition, because notices are generated with Polaris Reports, you can customize the standard Polaris notice formats and any system-generated information using Report Manager and Visual Studio.net. If your library uses a third party service for notices, you can [export certain notices directly to the vendor](#).

You can [set up notification options](#) at the system, library, or branch level that specify the kinds of notices used, the [library](#) that generates the notices, the [delivery methods](#), notice intervals, [language](#), and other options. Additional Polaris Administration settings specify how long to keep [notification history](#) in patrons' records.

Based on the notification options your library has set, the patrons and items that should be included in the next notification cycle are identified and the notices are queued. When the next notification cycle runs, the notices in the queue are sent according to the specified delivery method. Once notices are generated, the notice queue is cleared and the process begins again.

You can track notifications using [notification reports](#).

The following types of notices can be generated in Polaris:

- [Overdue, Missing Part, Combined Notices and Bills](#)
- [Request Pick-Up, Second Pick-Up, and Canceled Request Notices](#)
- [Fine Notices](#)
- [Reminder Notices](#)
- Serial Claiming Notices - For more information, see "Serial Claiming Notices" in the Serials Administration Guide.

Notices can be generated and sent in the following ways:

- [Mail](#)
- [Email](#)

- [Text message](#)
- Phone - For more information, search the Polaris help for "Delivering Notices by Phone-Outbound Telephony."

This section covers the following topics:

- The Notification Library

The notification library is the library responsible for producing and sending the notice and whose return address ordinarily appears on the notice. (If notices are generated for all libraries or branches from a central location, you can specify a central processing branch return address instead.) For overdue, bill, and fine notices, you can designate the patron's branch, the item's branch, or the lending branch as the notification library. This setting determines how patrons and items are identified for notification, based on the settings of the designated notification library.

For example, the notification library setting affects which patrons should receive overdue notices in these ways:

- Notification library is patron's library - If the patron's record includes one or more overdue items, and if the patron's registered branch is the notification library, a notice is generated from the patron's library for all the overdue items, regardless of the items' assigned branches or where the items were checked out.
- Notification library is item's library - If the patron's record includes one or more overdue items having an assigned branch that is the notification library, a notice is generated from the item's assigned branch for those items. A patron can receive more than one overdue notice from different branches, each notice listing different items.
- Notification library is lending library - If the patron's record includes one or more overdue items having a lending branch that is the notification library, a notice is generated from the lending branch for those items. A patron can receive more than one overdue notice from different branches if the overdue items were checked out at different branches.

It is also possible for branches to set the notification library for bills so that a patron can receive two bills for the same item. You may want to avoid this situation by coordinating the bill notification library settings among branches, even

if you allow a patron to receive more than one overdue notice from different branches.

**Example:**

Library A sets the overdue notification library to loaning branch. That is, they send overdue notices to borrowers transacting at Library A. Library B sets the overdue notification library to patron's branch. That is, they send overdue notices to Library B patrons. If a Library B patron borrows an item from Library A, and the item goes overdue, the patron gets an overdue notice from Library A and Library B. The Library B notice includes the overdue items transacted at Library A as well as any other overdue items the patron may have. If Library A and Library B set their notification library for bills in the same way, the patron may receive two bills for the same item.

You can avoid the potential confusion of duplicate bills if all branches use the same setting for the bill notification library. However, even if the settings allow the patron to receive two bills for the same item, the patron's account is charged only once. In this case, the Organization column in the Patron Status workform - Account view indicates **System** for the bill, rather than Library A or Library B.

Bills are triggered when the specified number of overdue notices have been sent. If the notification library for overdues is different from the notification library for bills, it is possible that a patron will not receive a bill at all. To prevent this situation, libraries should coordinate their settings.

**Example:**

Library A sets the overdue notification library to loaning branch. That is, they send overdue notices to borrowers transacting at Library A. Library B sets the overdue notification library to patron's branch. That is, they send overdue notices to Library B patrons. If a Library B patron borrows an item from Library A, and the item goes overdue, the patron gets an overdue notice from Library A and Library B. The Library B notice includes the overdue items transacted at Library A as well as any other overdue items the patron may have. If Library A and Library B set their notification library for bills in the same way, the patron may receive two bills for the same item.

- Notification History

A staff member can view a patron's notification history from the Patron Status workform - General view and the Patron Registration workform - Status view. Staff members can open or print a patron's notices from this view, or link to the related item records for overdue, bill, overdue reminder, and hold notices. The illustration shows a sample Patron Status workform.

Entries are retained in the notification history for periods you specify with two Polaris Administration Notification parameters, available at the system, library, or branch level:

- Notice history: hold notices time threshold - Controls how long pick-up and canceled hold notices are kept in the notice history. The default setting is 90 days; the maximum value is 9,999 days.
- Notice history: item and account notices time threshold - Controls how long overdue, fine, bill, and reminder notices are kept in the notice history. The default setting is 90 days; the maximum value is 9,999 days.

An entry is kept in the notification history if it falls within the specified period of time, the related item is checked out, claimed or lost by the current patron, and current charges are not resolved. The entry is kept under these circumstances even if the related item is purged or deleted from the database; in this case, the title is prefixed by **[DELETED]**.

**Note:**

Additional text message notices, which are sent in addition to another method, do not appear in the patron's notification history. For example, if both a printed notice and an additional text message notice are sent for an item, only the printed notice appears in the notification history.

---

## Calculating the Number of Days to Keep the Notice History

The number of days to keep the notice history is counted from the date following the notice through and including the number of days you specify in Polaris Administration. The notice is then cleared from the history during overnight processing.

**Example:**

The **Notice history: hold notices time threshold** parameter is set to

**10.** A hold notice was generated on the 1st day of the month. The notice history will be cleared on the 12th when the overnight process runs after midnight, counting from the 2nd of the month (the date following the date the notice was generated) through the 11th.

- Notice Delivery Methods

You can specify the delivery method for most notices as print, email, text message to mobile phone, phone (if you use outbound telephony software), or patron preference (print, email, phone, text message). Patron preference is set up during patron registration, when the patron selects a preferred delivery method for notices. The setting is available in the **Notification option** box on the Patron Registration workform Addresses view.

**Note:**

If the **Notification option** is set to **None** in a patron's record, that patron will receive no notices at all.

Also, you can optionally send text messages to patrons' mobile phones in addition to print, email, or voice phone notification. A patron will receive the additional text message only if the **Additional TXT notice** option is selected in the patron record, the **TXT** box is selected for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically selected.

If you select a delivery method for a particular kind of notice other than patron preference, the method you specify overrides the patron preference if the methods do not match.

**Example:**

A library decides to send overdue notices according to patron preference, but to send bills only as print notices. A patron who has specified a preferred delivery method of email receives overdue notices by email, but receives a bill as a printed notice.

There are certain exceptions. If the delivery method is email or phone, but Polaris detects an email failure or a phone failure, Polaris generates a printed notice. (For more information about email failures, see [Email Failure Detection](#)). Also, if the

delivery method is patron preference, and the patron's preference is changed, notices are not duplicated. This means that if a notice is delivered by one method and then the patron record is changed to a different delivery method, Polaris does not deliver the same notice again by the new method.

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## Hold Notice Processing for Email and Text Message Notices

A separate SQL job, **Hold Notice Processing**, processes email and text message (SMS) first and second hold notices separately from print notices and phone notices. Designed to run multiple times per day, the job runs every four hours from 9:00 AM to 8:00 PM by default. See the Polaris Administration PDF Guide, Polaris SQL Jobs Reference topic.

With this method, email and text message notices are not sent in the early morning when the print notification job runs. Patrons can receive their notices sooner because the notification can be scheduled to be more closely timed with your library's workflow for filling the requests. If your library has self-pickup for requested materials and you stock the shelves at certain times during the day, you can time the notices to go out near the time the items will be ready for pickup.

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## Delivery Methods for Serial Claim Notices

For serial claim notices, you can specify a delivery method of print, email, or supplier preference. The supplier preference method is indicated in the supplier record. If you select a delivery method other than supplier preference, the method you specify overrides the supplier preference if the methods do not match.

- Notification Language

If you have purchased the appropriate licenses for Polaris PowerPAC, you can send print and email notices in English and the licensed languages. Multilingual phone notification is available by separate license. Once set up, a patron receives notices in the licensed language if the **Language** field in the Patron Registration workform is set to that language.

If a multilingual license is purchased, the option is available at the system, library, and branch levels. Because branches can determine a notification library for each notice type, a notice may be generated for any patron from nearly any branch (see



[The Notification Library](#)). If the patron designates a preference for notices in Spanish, for example, the patron might receive some notices in Spanish and others in English depending on how the notification library option is set. For example, if the option is set to **Lending branch**, some branches may have enabled Spanish notices and others not. If the notifying library has enabled Spanish notices, the notice is sent in Spanish. For system-wide consistent results, you will need to coordinate branch settings.

Polaris provides default English and multilingual text (if licensed) and support that text in the standard formats.

**Notes:**

Language options do not apply to exported notices. Text messaging does not support Unicode, so text message notices in languages with diacritics are not rendered accurately.

- Customizing Notice Text with Polaris WebAdmin (Language Editor)

You can customize the text of both English and multilingual notices in Polaris WebAdmin (Language Editor.) You can add or customize language strings at the system, library, and branch levels. Branch settings override library settings; settings made at the library level override system-level settings.

You need the Polaris permission **WebAdmin access: Allow** to use the WebAdmin. In Polaris Administration, this permission is available at the system level under the System Administration security node. For more information about setting Polaris permissions, see [Granting Permissions](#).

To access WebAdmin, open your browser and navigate to the site where WebAdmin is installed. You must supply your Polaris username, password, and domain to log in to WebAdmin. For detailed information about using the Language Editor, select the WebAdmin **Help** tab.

- Exporting Notices to LX Starter

**Note:**

Contact Innovative to inquire about LX Starter.

The Library Experience (LX) Starter package provides an intuitive, web-based interface for your library to design and email automated circulation notices. LX Starter includes professionally designed email templates, which you can

customize using a visual email editor. For example, you can add custom branding, free stock photos, and cover images for items in your collection.

LX Starter integrates seamlessly with Polaris. Your library selects which notice types to send using LX Starter. Once enabled, Polaris uses your existing notice jobs to transfer notices to LX Starter, where they are sent based on the schedule your library defines.

LX Starter works with the following types of notices:

- Overdue notices
- Request pick-up notices
- Bill notices
- Fine notices
- Almost overdue/Auto-renew reminder notices

For more information, see the [LX Starter Administration help](#).

- Exporting Notices to a Third-Party Notification Service

You can set up notification in Polaris Administration to export both print and phone notices to a third-party service. If your library has a contract with a service such as Unique Management Services (UMS) to send printed notices, you can export overdue, bill, fine, request pick-up, and request cancellation notices directly to the vendor. You can export notices at the system or library level.

**Important:**

Contact your Polaris Site Manager if you need assistance updating your export configuration.

The following information from the patron record is included in the exported notices file:

- Last name, first name, middle name, title, suffix
- Patron barcode
- Patron code description
- Registered branch name
- Address for notices and bills (if none has been defined, the home address is used; if there is no home address, the first available address is used)
- Phone numbers

- Email addresses, primary and alternate
- Preferred language

The following additional information is included for each notice type:

- Overdue notices and bill - Item title, author, material type, barcode, due date, check-out location, check-out date, and overdue notice number. Bills also include any replacement cost, processing fee, overdue fine, and the patron account balance.
- Fine notices - Fee reason, author, title, call number, check-out date, amount, patron's account balance, patron's last activity date.

**Note:**

If the charge is not linked to any item, the item data fields are blank.

- Request pick-up notices - Item title, author, material type, barcode, date held, held until date (unclaimed date), pickup branch ID, pickup branch name.
- Request cancellation notices - Item title; item author; item material type (item-level request only); item barcode (item-level request only); request creation date; cancellation reason.

**Tip:**

If the patron record is set to receive notices by email, print, or text message, or if the notice type is set for email or print only, these notices are sent as designated and are not exported.

The vendor determines the notice text.

Your library may have a contract to use TALKINGtech's i-tiva for telephone notification. You can export overdue, fine, request pick-up, and request cancellation notices to i-tiva. TALKINGtech generates the telephone notices and sends an update back to Polaris via SIP (Standard Interchange Protocol), which updates the patrons' notification history. If a telephone notice fails, Polaris sends the notice in print. Polaris supports TALKINGtech's Format B and Format C. Format B is the default setting. If your library uses Format C and you upgrade Polaris, you must specify Format C with a command line parameter in the Notice Processing Job. Contact your Polaris Site Manager for assistance.

## Exporting Text Messages to i-tiva

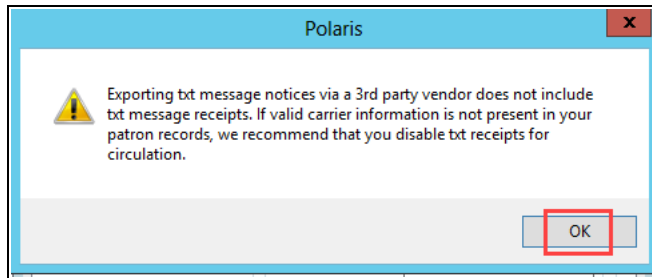
You can export text messages for patrons without carrier information to the i-tiva SMS service. The text messages are exported to a notice file report that is sent to i-tiva for processing, and i-tiva then sends back a success notice after each text message goes out. The incoming success notice updates notification information in the patron record.

1. Select the **Export** checkbox for this option.
2. Complete the **Text Message** export section to provide the FTP Server URI, Username, and Password for where the notice file report will be exported.

The screenshot shows the 'Notification options' dialog box with the 'General' tab selected. The 'Notification method' section on the left has several options checked: Print, Export, E-mail, Phone, and TXT Message. The 'Export' checkbox under 'TXT Message' is highlighted with a red box. The 'Text Message' section on the right is also highlighted with a red box and contains the following fields: FTP Server URI (ftp://ftp.polarislibrary.com), Logon name (Polarisexec@ftpsecure.pola), and Password (masked with dots). The 'Save a local copy' checkbox is checked. At the bottom, there are buttons for Save, Cancel, Apply, and Help.

When the Export option is selected, a warning note about disabling text

receipts is displayed. Select **OK** to close the message.



**Unspecified** is an option in the carrier list in Leap, the staff client, and PowerPac. Carrier information is required for patrons with a Notification preference of Txt Message. When the Export Txt Message option is selected, Unspecified is the default carrier when the patron has selected a text message phone number but has not selected a carrier.

- Notification Statistical Reports

Polaris offers two reports that track notification statistics—the Notification Summary and the Notification Detail Report. To access these reports, select **Utilities > Reports and Notices** on the Polaris shortcut bar, and select the **Notices** folder.

The reports offer statistics for print, email, and phone notices by language, and summarize and compare statistics across three fiscal years.

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## Notification Summary Report

This report summarizes the total number of print, email, and phone notices produced by fiscal year and notification language, and provides comparative statistics for the two previous fiscal years. The report also includes a summary total of all notices produced by language. Success and failure statistics are included for email and telephone notices as well. You can filter this report by branch, and set the fiscal year by ending month. (Because telephone notices run at the server level, they are not included if you choose to filter the report by a branch.)

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## Notification Detail Report

This report provides detailed statistics on the number of notices produced by notification method and notice type, each with a separate count by language. You can filter this report by branch, and set the fiscal year by ending month. (Because telephone notices run at the server level, they are not included if you choose to filter the report by a branch.)

**Note:**

In the Notification Detail Report, combined notice statistics are reported as individual notice types. For example, a combined notice that includes an overdue notice and a hold request pick-up notice is reported twice -- once as an overdue notice and once as a hold request pick-up notice.

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## Set up notification methods, e-mail options, and export location

To set up general notification options:

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**. The Notification Options dialog box - General tabbed page opens.
3. In the **Notification method** area, select *all* the methods that this organization might use to deliver notices. Then make these additional settings as appropriate:
  - Select **Available in PAC** for each method that patrons should be able to choose when self-registering or updating account preferences from PAC.
  - (System and library level only) Select **Print** and **Export** if you export notices for print delivery. Select **Phone** and **Export** if you export notices for telephone notification.
4. The method settings determine which delivery options are available for selection for specific types of notices.

**Note:**

At the system, library, or branch level you can designate a specific method for each type of notice when you set up the specific notices.

If you plan to designate **Patron Preference** as a notification method, or **Supplier Preference** for serial claim notices, be sure to select the possible preference options in this list. See [Notice Delivery Methods](#). If you export print or telephone notices to an outside vendor, each branch must set the notification method to **Print** for all exported notice types if all branches' notices should be exported.

5. To select the languages in which to send notices:

**Note:**

Multi-lingual notices are a separately licensed feature. See [Notification Language](#). When you enable multi-lingual notices here, patrons can also select a preferred language for notification when they register from the PAC; once registered, they can change their language preference from the patron account page (**Change Preferences** option). Not all languages are available for telephone notification. Text messaging does not support Unicode, so notices in languages with diacritics are not rendered accurately.

- a. Click the **Languages** link. The Licensed Languages dialog box opens.
- b. Select the languages in which you will send notices, and click **OK**.

**Note:**

The read-only **Licensed** column shows which languages are licensed for your system. If notice translations are not available for a licensed language and you need notification in that language, contact your Polaris Site Manager.

6. If this organization sends any type of e-mail notices, set the following options in the **E-mail notice** area:

- **From** - Type the library e-mail address that should appear in the From field of the e-mail notice.
- **Reply-to** - Type the library e-mail address that should appear in the Reply to field of the e-mail notice.
- **E-mail address to use** - To use only the primary e-mail address specified in the patron record, select **Use E-mail address only**. To send the notice to both the patron's primary e-mail address and an alternate e-mail address, if any is specified in the patron record, select **Use both E-mail and Alt E-mail**.

7. For e-mail notices, if you want Polaris to send the notice processing report to a staff member, set these options:

- Select **Send report for e-mail notice processing**.

**Tip:**

The summary report is also available from the Report Manager. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar to open the Report Manager. In the Report Manager, select **Notices, Email, Email\_SummaryReport**.

- In the box below the report option, type the e-mail address of the staff member who should receive the report. You can type more than one e-mail address, separating the addresses with a semicolon (;). The maximum number of characters is 255.
8. (System level only) If you have a contract with an outside vendor to send print notices, supply information in the following **Print Export** fields:
- **FTP Server URI** - Type the full Internet address of the vendor's FTP server. Your exported notice file will be sent to this address.
  - **Logon Name** - Type the logon name for the vendor's FTP server.
  - **Password** - Type the password for the vendor's FTP server.
  - **Save a local copy** - Select this option to save a copy of exported notices. When this option is selected, the copy is automatically saved on the Polaris server to **C:\ProgramData\Polaris\[version]\Logs\EXPORTNOTICES\Reports**

**Note:**

Local copies are not automatically deleted. You may want to purge them periodically.

If you leave this option unchecked, the notice file is saved in **C:\ProgramData\Polaris\[version]\Temp** on the Polaris server for FTP transmission.

9. (System level only) If you have a contract with an outside vendor to send phone notices, supply information in the following **Phone Export** fields:
- **FTP Server URI** - Type the full Internet address of the vendor's FTP server. Your exported notice file will be sent to this address.
  - **Logon Name** - Type the logon name for the vendor's FTP server.



- **Password** - Type the password for the vendor's FTP server.
- **Save a local copy** - Select this option to save a copy of exported notices. When this option is selected, the copy is automatically saved on the Polaris server to **C:\ProgramData\Polaris\[version]\Logs\EXPORTNOTICES\Reports**

**Note:**

Local copies are not automatically deleted. You might want to purge them periodically. If you leave this option unchecked, the notice file is saved in **C:\ProgramData\Polaris\[version]\Temp** on the Polaris server for FTP transmission.

**Note:**

If you export print notices to one vendor and phone notices to a different vendor, you can specify different **Export** settings for each method.

10. Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up a specific notice type.

See also:

- [Overdue, Missing Part, Combined Notices and Bills](#)
- [Fine Notices](#)
- [Request Pick-Up, Second Pick-Up, & Cancelled Request Notices](#)
- [Reminder Notices](#)
- The Serials Administration PDF Guide, Setting Up Routing
- The Serials Administration PDF Guide, Setting Up Serials Claiming

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## Overdue, Missing Part, Combined Notices and Bills

Polaris provides up to three scheduled overdue notices for a patron, followed by an optional bill. You can also choose to combine notices for patrons due to receive more than one type.

See also: [Set up overdue notices, bills, and combined notices](#)

### Overdue Notices

You can send up to three overdue notices, scheduling the interval between them. Each overdue interval is measured from the date and time the item status changed to overdue, not from the date and time that the previous notice was sent. An item qualifies for inclusion in an overdue notice when the number of days specified in the interval setting added to the due date of the item falls before midnight on the processing date. If an item has qualified for overdue notice processing, but is returned before the notice is sent, the item is removed from notice processing.

Overdue notices can be delivered through the mail as print notices, by e-mail, by phone, or as text messages to mobile phones. Print and e-mail overdue notices include the following information:

**Note:**

Text messages must be brief. The default text message for overdue notices, which can be edited in Polaris Language Editor, is **Library items are overdue. Please call the library or check your account online.**

- Library return address - Taken from the **Return** address field in the notification branch's organization record. If no return address is specified, the notice uses the organization's **Primary** address. For full-page and Z-fold printed notices, the notification branch's primary phone number is also included.
- Date - Date the notice was generated
- Printed notice text - Polaris supplies default text for the header and introductory paragraph, which you can edit in Polaris WebAdmin (Language Editor). See [Customizing Notice Text with Polaris WebAdmin \(Language Editor\)](#).

- E-mail notice text - Polaris supplies default text for the subject line and introductory paragraph, which you can edit in Polaris WebAdmin (Language Editor). See [Customizing Notice Text with Polaris WebAdmin \(Language Editor\)](#).
- System-supplied list of overdue items - Items are sorted first by notice number (1st, 2nd, 3rd), next in title order. Call numbers are truncated to 60 characters.
- (Optional) Claimed items - You can include a list of claimed items with their status (Claim Never Had, Claim Returned).

When overdue notices are generated, the date is recorded in the appropriate item records, the notices are posted in the transaction file, the patron notification history is updated, and the notice queue is cleared.

### Missing Parts Notices

Missing part notices are sent when a staff member checks in an item using the Special Item Check-in Tools option on the Check In workform and selects **Missing part: block and notify**. For more information, see the Patron Services PDF Guide, Special Item Check-in Tools option on the Check In workform topic.

The notices are sent according to the setting in the [Notification options parameter](#) for the check-in branch, and the patron preference set in the patron's record. You can set up missing part notices to be printed and mailed; sent via email; sent via text message; or sent by phone message. Missing part notices can be sent as [reminder notices](#) or in a [combined notice](#). The Missing Part Mailer is available under Utilities > Reports and Notices > Notices > Claims > Missing Part Mailer.

The missing part notice contains similar information whether delivered by mail, email, or text message.

The Subject line in both the email and text message is: **Missing Library Item**

- The default text for the email, printed, and phone notice is: **An item was returned to the [check-in library name] missing a part(s). Please return the part(s) to the library within 48 hours to avoid fines.**
- The default text for the text message notice is: **[item title] was returned to the library with parts missing. Please return the part(s) to the library within 48 hours to avoid fines.**
- The following item details are included in the emailed and printed Missing Part notice: Title, Author, Barcode, Format, Due Date, Check-out Date, Check-out from [check out library name]

- The text regarding the missing item is included on the printed and email notice if it was entered when the staff member checked the item in using the Special Item Check-In option.

## Bills

You can follow up overdue notices with a bill. Bills are scheduled for processing at a standard interval from the date and time the item status changed to overdue, not from the date and time that the last overdue notice was sent (see [Overdue Notices](#)). An item qualifies for inclusion in a bill when the number of days specified in the interval setting added to the due date of the item falls before midnight on the processing date. If an item has qualified for bill processing but is returned before the notice is sent, the item is removed from notice processing. Bills may include overdue charges and replacement fees. Settings for free days are not used in the overdue fine calculation, but closed days and dates are included. For more information about replacement fees, see [Setting Replacement Fee Defaults](#).

Bills can be delivered as print, e-mail, or text message notices. Print and e-mail bills include the following information:

### Note:

Text messages must be brief. The default text message for bills, which can be edited in Polaris WebAdmin (Language Editor), is **Money is owed on your library account. Please call the library or check your account online.**

- Library return address - Taken from the **Return** address field in the notification branch's organization record. If no return address is specified, the notice uses the organization's **Primary** address. For full-page and Z-fold printed notices, the notification branch's primary phone number is also included.
- Date - Date the notice was generated
- Printed notice text - Polaris supplies default text for the header and introductory paragraph, which you can edit in Polaris WebAdmin.
- E-mail notice text - Polaris supplies default text for the subject line and introductory paragraph, which you can edit in Polaris WebAdmin.

### Note:

For information on customizing text, see [Customizing Notice Text with Polaris WebAdmin \(Language Editor\)](#).

- System-supplied list of items billed - Each item listing includes the replacement cost and overdue charges, and the total of these for each item. Call numbers are truncated to 60 characters.
- System-supplied total amount billed - Total amount due for the bill.

**Note:**

If you set overdue notice processing to include claimed items, the bill also includes claimed items. See [Overdue Notices](#).

Bills are generated as part of overdue notice processing. When the bills are generated, the date is recorded in the appropriate item records, the notices are posted in the transaction file, the patron notification history is updated, and the notice queue is cleared. If the system-level Patron Services setting **Overdues: billed items set to lost (Lost item charge options** parameter) is set to **No**, replacement and overdue charges are written to the patron account, the item status remains Out, the item remains in the patron's Items Out list, and the lost item counter is not incremented. If **Overdues: billed items set to lost** is set to **Yes**, replacement charges are written to the patron account, the item status changes to Lost, the item is removed from the patron's Items Out list, and the lost item counter is incremented. When **Overdues: billed items set to lost** is set to **Yes**, a separate setting determines whether overdue fines are also written to the patron account. See [Overdue Fines on Lost Items](#).

**Combined Notices**

When notification processing identifies a patron as qualifying for more than one type of notice, Polaris can combine overdue, bill, and request notices (in that order), so that a single notice is sent.

To ensure that all notices for a particular patron are included in the combined notice, set the same notification method for each notice type and the combined notice. For example, if the combined notice method is set to **Patron Preference**, set each overdue notice, bill, and hold notice to **Patron Preference**. Otherwise a notice type may not be included in the combined notice. For example, if you set the notification method for bills to **Print** but set other notice types to **Patron Preference**, the bill will be included in the combined notice only if the patron preference happens to be **Print**. In this situation, to ensure that bills will be printed for all patrons who are due for them, you would need to generate the billing notices in addition to the combined notices. If **Include claimed items** and **Combined patron notices** options are selected on the Overdue & Bill tab, the Missing Part notice is included in the combined notice.

## Set up overdue notices, bills, and combined notices

To set up overdue notices, bills, and combined notices:

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**. The Notification Options dialog box - General tabbed page appears. Verify that the possible [delivery methods](#) have been specified.
3. Click the **Overdue & Bill** tab.
4. If you send [overdue notices](#), select **Overdue**.
5. In the **Overdue** section, select **Export** if you export overdue notices to an outside vendor for delivery. This option is available only if **Export** has been selected for a delivery method on the General tabbed page at the system or library level. See [Exporting Notices to a Notification Service](#).
6. In the **First overdue** section, set the options for first overdue notices:
  - a. In the **Notice interval** box, type or select the number of days (999 maximum) after an item is declared overdue that the item is added to the queue for the first overdue notice.
  - b. To include claimed items in overdue notice processing, select **Include claimed items**.
  - c. Select a delivery method in the **Notification Method** box.

You can deliver overdue notices by any of the [methods](#) you selected on the General tabbed page.

### **Important:**

If you export overdue notices to an outside vendor for print delivery, the notification method must be set to **Print** at the system, library, and branch levels if you want to export the notices from all organizations. If a branch-level method is set to e-mail or phone, the system produces notices according to that method. If the method is set to **Patron Preference**, and the patron's preference is set to **Print**, the notice is exported, but if the patron's preference is e-mail, phone, or text message, that method is used.

- d. Select **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones in addition to the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

- e. Select the library that should generate the overdue notice in the **Notification library** box.

The notification library is the library responsible for producing and sending the notice. For more information about how this selection determines which patrons and items are identified for overdue notice processing, see [The Notification Library](#).

- f. Set the return address for the notice in the **Return address** box:
- **Use notification library** - This option uses the address specified in the organization record for the notification library.
  - **Use optional address** - Select this option to set an address other than the notification library if your library uses a central location to process and send notices. If you select this option, select the organization whose address should appear on the notice.

**Note:**

If the notification library is set to **Item's branch** or **Transacting branch**, and the return address is set to **Use notification library**, the return address on the notices is that of the item branch or transacting branch. If you want the return address to be your own, select **Use optional address** and choose your own branch.

7. If you send second overdue notices, set the interval and method in the **Second overdue** section.

To prevent Polaris from generating an overdue notice for a particular overdue level, as well as the overdue levels that follow it, set the overdue level to zero (**0**). For example, if you do not want to send second and third overdue notices, set the **Notice interval** for the second overdue to **0**.

The interval is measured from the point when the item status changed to overdue, not from the first overdue notice. The method and settings can be different from the first overdue notice settings. The notification library, return address, and claimed items settings are the same as the first overdue notice settings.

8. If you send third overdue notices, set the interval and method in the **Third overdue** section.

**Note:**

If you do not send third overdue notices, set the **Notice interval** for the third overdue to **0**.

The interval is measured from the point when the item status changed to overdue, not from the second overdue notice. The method settings can be different from the first and second overdue notice settings. The notification library, return address, and claimed items settings are the same as the first overdue notice settings.

9. If you send [bills](#), select **Bill**, and set the following options:
  - a. Select **Export** if you export bills to an outside vendor for delivery. This option is available only if **Export** has been selected for a delivery method on the General tabbed page at the system level. Bills cannot be exported for telephone notification.
  - b. In the **Notice interval** box, type or select the number of days (999 maximum) after an item is declared overdue that the item is added to the queue for the billing notice.

**Note:**

Coordinate this setting with your interval settings for overdue notices.

- c. Select a delivery method in the **Notification Method** box.



You can deliver bills by print, e-mail, or text message if you have selected the method on the General tabbed page. See [Set up notification methods, e-mail options, and export location](#).

**Note:**

Bills cannot be delivered by telephone. If you set the method to **Patron Preference** and the patron's preference is set to **Phone** in the patron record, the notice will be printed instead.

**Important:**

If you export billing notices to an outside vendor for print delivery, the notification method must be set to **Print** at the system, library, and branch levels if you want to export the notices from all organizations. If a branch-level method is set to e-mail, the system produces notices according to that method. If the method is set to **Patron Preference**, and the patron's preference is set to **Print**, the notice is exported, but if the patron's preference is e-mail or text message, that method is used.

- d. Select **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones in addition to the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

- e. Select the library to generate the bill in the **Notification library** box.

The notification library is the library responsible for producing and sending the notice. For more information about how this selection affects which patrons and items are identified for bill processing, see [The Notification Library](#).

- f. Set the return address for the bill in the **Return address** box:
- Use notification library - This option uses the address specified in the organization record for the notification library.
  - Use optional address - Select this option to set an address other than the notification library if your notices are processed and sent from a central location. If you select this option, select the organization whose address should appear on the notice.
10. To send combined notices (see [Combined Notices](#)), select **Combine patron notices** and set the delivery method.

You can deliver combined notices by any of the methods you selected on the General tabbed page. See [Set up notification methods, e-mail options, and export location](#).

**Note:**

If **Combine patron notices** is not checked, combined e-mail notices are not automatically generated. However, the option is displayed and functions from the Polaris Reports utility.

11. Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up another notice type.

**Related Information**

- Prevent a specific patron from receiving overdue notices - Select the **Exclude from overdue notice** checkbox on the Patron Registration workform - General view. See [Add general data to a patron record](#).
- Prevent a specific patron from receiving bills - Select **Exclude from billing** on the Patron Registration workform - General view. See [Add general data to a patron record](#).
- Patron billing statement - The Patron Billing Statement is a notice that lists all the current charges on a specific patron's account. You can print this notice for a specific patron or patrons, or on an organization basis, automatically printing a statement of current charges for each patron who owes an amount within a specified range. This notice is intended to help patrons understand exactly what they owe, and does not affect the notices queue in any way. See [Print patron billing statements](#).
- Setting circulation blocks - See [Defining Circ and Request Limit Blocks](#).
- Generating printed notices - See [Printing Notices](#).

- Generating e-mail notices - See [Delivering Notices By E-mail](#).
- Setting up text message notices - See [Delivering Notices by Text Message](#).
- Telephone notification - See the Telephony\_Administration PDF Guide, >Delivering Notices by Phone (Outbound Telephony).

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## Request Pick-Up, Second Pick-Up, and Cancelled Request Notices

Polaris offers three types of notices related to hold requests: request pick-up, second pick-up, and cancelled request notices. See: [Set up request pick-up, second pick-up, and cancelled request notices](#).

### Note:

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately from print notices and phone notices. Designed to run multiple times per day, the job runs every 4 hours from 9:00 a.m. to 8:00 p.m. by default. See [Hold Notice Processing for E-Mail and Text Message Notices](#).

## Request Pick-Up Notices

Request pick-up notices inform patrons that an item that fills a hold or ILL request is available for pick-up. When an item is trapped for a hold request and the item's circulation status changes to Held, the item is included in request notice processing. The patron who should receive the notice is identified by the link to the request. The notification library for hold request notices is always the pick-up library. If the pick-up library is changed, a new notice is generated when the item status becomes Held at the new pick-up branch. (If the notice has not been generated for the first pick-up location, the first notice is deleted.) ILL items are also included in request pick-up notice processing. When an item record is created for an ILL request, and the circulation status becomes Held, the item is included in the request notice.

Request pick-up notices can be delivered as print notices, e-mail notices, by telephone, or by text message. Print and e-mail request notices include the following information:

### Note:

Text messages must be brief. The default text message for request pick-up notices, which can be edited in Polaris Language Editor, is **The item you requested [first 20 characters of title] is available for pickup at branch [branch display name] until [unclaim date]**. One message is sent

for each item held. If items are held at more than one branch, the patron will receive a notice from each branch.

- Library return address - Taken from the **Return** address field in the pick-up library's organization record. If no return address is specified, the notice uses the organization's **Primary** address.
- Date - Date the notice was generated
- Printed notice text - Polaris supplies default text for the header and introductory paragraph, which you can edit in Polaris Language Editor.
- E-mail notice text - Polaris supplies default text for the subject line and introductory paragraph, which you can edit in Polaris WebAdmin (Language Editor).
- System-supplied list of items to pick up - The items are sorted by title. Each entry includes the title, author, item material type, item barcode, and Held-Till date.

When request notices are generated, the date is recorded in the appropriate item records, the notices are posted in the transaction file, and the notice queue is cleared.

### Second Pick-Up Notices

You can follow up a patron's first hold pick-up notice with a second notice, sent after a time interval you specify, for requests that remain with a Held status. The second notice can be sent by print, phone, e-mail, or TXT message. The default text is the same as that defined for the first notice, and can be edited in WebAdmin (Polaris Language Editor).

The notice is sent if the number of days specified is reached and the request status is still Held. If the hold request status becomes Unclaimed after the process to send the second notice runs, the notice will be removed from the notification queue. Your settings also apply to ILL requests, which do not have an Unclaimed status; in this case, the second notice is sent if the item has not been checked out within the specified period.

#### Note:

There is no program dependency between the notice interval for the 2nd hold notice and your setting for **Number of days held for pickup**, specified in the Requests parameter **Holds options**. If the notice interval is greater than the number of days held for pickup, the notice is never sent, so you may want to coordinate these settings.

When the notice is sent, it appears in the patron's notification history as **2nd hold notice**. The item record also shows the notice date. Status reports such as Delivery Failure

reports include the second hold notice with the hold notices. The second hold notice is also included in the total hold notice count for statistical reports.

**Note:**

Because multiple first and second hold notices may appear in a single print, e-mail, or text message notice, the notification log lists the type for all hold pick-up notices as 2 (regular hold notice request).

For best results with printed notices, the **Holds overnight processing** job should run before the **Notices processing** job.

**Note:**

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately from print notices and phone notices. Designed to run multiple times per day, the job runs every 4 hours from 9:00 a.m. to 8:00 p.m. by default. See [Hold Notice Processing for E-Mail and Text Message Notices](#).

## Cancelled Request Notices

Cancelled request notices are sent when a request status changes from Active, Pending, or Inactive to Cancelled. A request status changes to Cancelled in these circumstances:

- The last item linked to a bibliographic record is deleted
- A purchase order is cancelled
- A request is manually cancelled from the staff client
- A request is cancelled from PAC

However, cancelled request notices are not sent in these circumstances:

- A request status changes from Held to Unclaimed, then changes to Cancelled
- A Held item is checked out to another patron, and the original request is not reactivated
- A staff member is prompted to hold an item to fill a request but declines to fill the request with that item, and chooses not to reactivate the request
- An item is checked out to a patron who has a request for it, and the request status is still Pending. The request is automatically cancelled because the patron has the item.
- A request is accidentally cancelled, then reactivated for the same patron before notice processing

## Notices for Integrated Ebook Requests

If your library offers PAC users integrated eContent such as cloudLibrary ebooks, patrons may request ebooks and cancel their requests from the PAC. Notices for “held” ebooks (requests available for checkout) and cancelled requests are available for ebooks. These notices can be sent via e-mail, TXT message, or patron preference if the preference is one of these methods.

**Note:**

Second pick-up notices are not available for ebooks.

When ebook request notices are enabled, the patron receives a notice when a requested ebook is available for checkout and download. Request notices are sent when the request is placed in PAC and when the request is placed in the cloudLibrary (former 3M Cloud Library) application. The subject line and notice text can be edited in Polaris WebAdmin; the Notice “product” language strings are **NOTICE\_EBOOKREQAVAILSUB** (subject line) and **NOTICE\_EBOOKREQAVAILBODY** (notice text).

The same text defined in WebAdmin is used for both e-mail and TXT notices. Text can be defined for the hold notice and the hold cancel notice, but the text defined for the notice will be used in both the email and TXT notification messages. Because of the character limit for TXT messages, the text of the notification is kept to a minimum.

When cancelled ebook request notices are enabled, the patron receives a notice when he or she cancels the request from the PAC patron account. When the patron cancels multiple requests in one action, these notices are combined in one e-mail notice. TXT notices are sent separately due to message length restrictions. (If the patron cancels a request from the cloudLibrary application, no notice is sent.) The subject line and notice text can be edited in WebAdmin; the PowerPAC “product” language strings are **PACML\_EBOOKCANCELSUBJ** (subject line) and **PACML\_EBOOKCANCEL** (notice text).

The notices are sent close to the time of the action taken in PAC, according to the settings of the patron’s branch. Request and request cancel notices appear in the patron’s notification history. The notices are logged with other notice types, and failures are reported in the e-mail and TXT failure reports.

## Set up request pick-up, second pick-up, and cancelled request notices

These notices are sent according to the settings of the request’s pick-up library. To set up hold request pick-up notices and canceled request notices:

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**. The Notification Options dialog box - General tabbed page is displayed. Verify that the possible delivery methods have been specified. See [Set up notification methods, e-mail options, and export location](#).
3. Click the **Hold Request & Cancellation** tab.
4. To enable request pick-up notices:
  - a. Select **Request**.
  - b. Select **Export** if you export request notices to an outside vendor for delivery. This option is available only if **Export** has been selected for a delivery method on the General tabbed page at the system or library level. See [Exporting Notices to a Notification Service](#).

**Important:**

If you export request notices to an outside vendor for print delivery, the notification method must be set to **Print** at the system, library, and branch levels to export the notices from all organizations. If a branch-level method is set to e-mail or phone, the system produces notices according to that method. If the method is set to **Patron Preference**, and the patron's preference is set to **Print**, the notice is exported, but if the patron's preference is e-mail, phone, or text message, that method is used.

- c. Select a delivery method in the **Notification Method** box. You can deliver request notices by any of the methods you selected on the General tabbed page. See [Set up notification methods, e-mail options, and export location](#).
- d. Select **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones in addition to the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.



If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

5. To enable second pick-up notices, follow these steps:

- a. Select **2nd hold notice**.
- b. Select the delivery method. You can deliver request notices by any of the methods you selected on the General tabbed page. See [Set up notification methods, e-mail options, and export location](#). The default setting is **Patron Preference**.

**Note:**

If you export the regular hold request notice to a third-party service, the second hold notice is also exported.

- c. Select **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones in addition to the notification method you selected.
- d. Set the **Notice Interval** for the number of days to wait from the date the request became Held before sending the second notice. The count includes the date held. For example, if the item was Held on the 1st of the month and the interval is set to 3 days (the default), the notice is sent on the 3rd. See [Second Pick-Up Notices](#) for more details about second request processing.

6. To enable cancelled request notices, follow these steps:

**Note:**

If you export request pick-up notices, and enable cancelled request notices, these are also exported.

- a. Select a delivery method in the **Notification Method** box. You can deliver cancelled request notices by any of the methods you selected on the General tabbed page. See [Set up notification methods, e-mail options, and export location](#).
- b. Select **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones in addition to the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is

checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

7. To enable ebook hold notices, select **Ebook request**, and select a notification method (e-mail, TXT, or both). See [Notices for Integrated Ebook Requests](#).

**Note:**

If you select **Both** for the method, the notice is sent either by e-mail or TXT message, depending on the patron's notification preference. If the patron has not selected either option as a preference, the patron will not receive notification.

8. To enable notices for cancelled ebook requests, select **Cancelled ebook request**, and select a notification method. See [Notices for Integrated Ebook Requests](#).

**Note:**

If you select **Both** for the method, the notice is sent either by e-mail or TXT message, depending on the patron's notification preference. If the patron has not selected either option as a preference, the patron will not receive notification.

9. Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up another notice type.

**Related Information**

- Prevent a specific patron from receiving request notices - Select the **Exclude from hold notice** checkbox on the Patron Registration workform - General view. See the Patron Services PDF Guide, Add general data to a patron record.
- Setting up requests processing - See [Setting Up Holds and ILL Request Processing](#).
- Processing requests - See the Patron Services PDF Guide, Working with Interlibrary Loans and Working with Interlibrary Loans.
- Generating printed notices - See [Printing Notices](#).
- Generating e-mail notices - See [Delivering Notices By E-mail](#).

- Setting up text message notices - See [Delivering Notices by Text Message](#).
- Telephone notification - See the Telephony Administration PDF Guide, Delivering Notices by Phone (Outbound Telephony).

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## Fine Notices

Fine notices, sometimes called collection notices, are optional. They are typically sent to patrons to warn them that their account will be referred to a collection agency within a certain period of time. A patron receives a fine notice when the amount owed exceeds a specified amount, excluding fines defined as recent. (Patrons whose accounts are already in collection do not receive fine notices.) The criteria for fine notices are independent of the criteria you specify for overdue and billing notices, although a patron typically receives several overdue notices and bills before receiving a fine notice. Patrons receive only one fine notice, but they may continue to receive overdue notices or bills.

If you use a collection agency that does not send an initial warning notice to patrons, you may want to set up fine notices. However, if you use a collection agency that handles the initial patron notification for collection, such as UMS, you may not want to send your own fine notices. You can also send fine notices even if you do not use collection agency services, specifying your own message for the notice.

Fine notices can be delivered as print notices, e-mail notices, or text messages. When fine notices are generated, the notices are posted in the transaction file, and the notice queue is cleared. See: [Set Up Fine Notices](#)

### Set Up Fine Notices

To set up fine notices:

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**. The Notification Options dialog box - General tabbed page is displayed. Verify that the possible delivery methods have been specified. See [Set up notification methods, e-mail options, and export location](#).
3. Click the **Fine** tab.
4. To enable fine notices, select **Fine**.
5. Select **Export** if you export fine notices to an outside vendor for delivery. This option is available only if **Export** has been selected for a delivery method on the

General tabbed page at the system or library level. See [Exporting Notices to a Notification Service](#).

**Important:**

If you export fine notices to an outside vendor for print delivery, the notification method must be set to **Print** at the system, library, and branch levels if you want to export the notices from all organizations. If a branch-level method is set to e-mail, the system produces notices according to that method. If the method is set to **Patron Preference**, and the patron's preference is set to **Print**, the notice is exported, but if the patron's preference is e-mail or text message, that method is used. Fine notices cannot be delivered by phone.

6. Select a delivery method in the **Notification Method** box. You can deliver fine notices by any of the methods you selected on the General tabbed page except phone. See [Set up notification methods, e-mail options, and export location](#).

**Note:**

Fine notices cannot be delivered by telephone. If you set the method to **Patron Preference** and the patron's preference is set to **Phone** in the patron record, the notice will be printed instead.

7. Select **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones in addition to the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

8. Select the library that should generate the fine notice in the **Notification library** box.

The notification library is the library responsible for producing and sending the notice. For more information about how this selection affects which patrons and items are identified for fine processing, see [The Notification Library](#).

9. Set the return address for the notice in the **Return address** box:
  - **Use notification library** - This option uses the address specified in the organization record for the notification library.

**Tip:**

Select **Use optional address** if your notices are processed and sent from a central location.

- **Use optional address** - Select this option to set an address other than the notification library. If you select this option, select the organization whose address should appear on the notice.
10. (Optional) Specify which user-defined field (UDF) to use for guardian (for patrons under the age of 18). See [Reporting Minors](#). If you specify a guardian UDF, the fine notice regarding the minor's delinquent account is sent to the minor in care of the guardian, at the guardian's address.

**Note:**

If your library does not use a UDF for guardian barcode, or if no guardian can be determined, the notice is sent to the minor patron.

**Tip:**

Set this value to one equal or greater than the **Second Level Fine** amount set in the Patron and Material Loan Limit table. See [Defining Loan and Request Limit Blocks](#).

11. In the **Minimum balance** box, type the amount owed that a patron must exceed to receive a fine notice. For example, if the minimum balance is set at \$50.00, a fine notice is generated when the patron owes more than \$50.00.
12. In the **Fine age (days)** box, specify the number of days old a fine must be to be included in the balance that triggers the fine notice.

**Example:**

The **Minimum Balance** is set to \$25.00 and the **Fine Age** is set to 10 days. If the patron's fines still exceed \$25.00 10 days after the latest fine is incurred, the patron receives a fine notice.

If you use collection agency services, be sure the **Fine age (days)** setting is less than the fine age setting for sending an account to collection. This will ensure that the patron receives the notice before the account is sent to collection. See [Using a Collection Agency](#).

13. Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up another notice type.

#### Related Information

- Collection agency services - See [Managing Collection Agency Services](#).
- Patron billing statement - The Patron Billing Statement is a notice that lists all the current charges on a specific patron's account. You can print this notice for a specific patron or patrons, or on an organization basis, automatically printing a statement of current charges for each patron who owes an amount within a specified range. This notice is intended to help patrons understand exactly what they owe, and does not affect the notices queue in any way. See [Print patron billing statements](#).
- Generating printed notices - See [Printing Notices](#).
- Generating e-mail notices - See [Delivering Notices By E-mail](#).
- Setting up text message notices - See [Delivering Notices by Text Message](#).
- Telephone notification - See [Delivering Notices by Phone \(Outbound Telephony\)](#).

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## Reminder Notices

You can send email reminder notices to any qualifying patrons with a valid email address, regardless of the patrons' preferred notification method, and optionally send an additional text message. If a patron's record does not contain an email address, but does contain a phone number and carrier for text messaging, reminder notices will be sent via text message. See: [Setting Up E-mail Reminder Notices](#).

The following email reminder notices are available:

- **Almost overdue notice/Auto-renew** - A notice is sent a specified number of days before a patron's item becomes overdue. If automatic renewals are enabled, and the patron has items out that were renewed, the notice also includes these items. The notice also lists other items that the patron currently has checked out. Polaris supplies the item title, call number, volume, due date, format, check-out branch, and number of renewals left for each item. When an Almost Overdue reminder notice is sent regarding an item, the date is recorded in the item record. The default setting in the Notification options parameter is to exclude integrated eContent titles in reminder notices, but your library can change this default setting.
- **Patron record expiration notice** - A notice is sent a specified number of days before a patron's registration expires. The notice alerts the patron to contact the library. Polaris supplies the patron's home address, telephone number, and email address for verification.
- **Inactive patron notice** - A notice is sent to a patron whose account has had no activity for a specified number of days. The notice advises the patron to visit the library or call to update the patron's registration. Polaris supplies the patron's home address, telephone number, and email address for verification.
- [Missing part notice](#) - A notice is sent to a patron if an item was checked in using the Special Item Check-in function, and the **Missing part: block & notify** option was selected.

**Note:**

The **Last Activity Date** field in the patron record tracks patron activity. It is updated in the following circumstances. Staff client: item check-out;



renewal; quick-circ item check-out; a claim is made on an item. PAC: log-in to patron account; placing and modifying hold and ILL requests; online renewal; patron information updates; payments; access to remote databases that require log-in. Polaris ExpressCheck, SIP self-check units: check-out and renewal; patron account access; payments. Time and print management applications: log-in. Inbound telephony: Access account information and renew items.

Reminders are sent according to the settings for the patron's registered branch (not the item's assigned branch or the loaning branch).

Reminder notices are sent only once. The notice processing program runs daily so that reminder notices are not re-sent to the same patrons. You can modify the subject line and introductory text of all reminder notices using Polaris WebAdmin (Language Editor). See [Customizing Notice Text with Polaris WebAdmin \(Language Editor\)](#).

Reminder notices are not exported to outside vendors.

### Setting Up E-mail Reminder Notices

To set up e-mail reminder notices:

**Note:**

For reminder notices, the notification library is always the patron's registered branch.

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**. The Notification Options dialog box - General tabbed page is displayed. Verify that e-mail and text messages (if you will send additional text messages) have been specified as possible delivery methods. See [Set up notification methods, e-mail options, and export location](#).
3. Click the **Reminder** tab.

4. To send text message reminders in addition to e-mail reminders, select **Send additional TXT message**.

A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

**Note:**

If you want to enable the additional reminder text message but a specific patron prefers not to receive the additional reminder text messages, clear the **Additional TXT notice** option in the patron record.

5. To set up “almost overdue” notices, follow these steps:
  - a. Select **Almost overdue**.
  - b. Select or type the number of days before an item is overdue that qualifies the patron to receive the notice.
  - c. Select or type the number of days that should elapse between notices. This setting prevents multiple e-mail messages from being sent to the same person over several days.

- d. If you want to change the **Include integrated eContent titles** option, select or clear the checkbox. The default setting for the Include integrated eContent titles checkbox is unchecked, meaning these titles do not appear as almost overdue items on reminder notices.
6. To set up reminder notices for patrons whose accounts are due to expire, follow these steps:
  - a. Select **Patron record expiration**.
  - b. Select or type the number of days before the registration expires that qualifies the patron to receive the notice.
7. To set up reminder notices for patrons whose accounts are inactive, follow these steps:
  - a. Select **Inactive patron**.
  - b. Select or type the elapsed number of days with no account activity that qualifies the patron to receive the notice.
8. To set up missing part notices for patrons who return multi-part sets that are missing parts:
  - a. Select **Missing part notice**.
  - b. Select the notification method.
  - c. Select **Send additional TXT message** if you want patrons to get an additional text message for missing parts.
  - d. If you want to change the default notification method of **Patron preference**, select a different option.
  - e. If you want to change the default notification library of **Patron's branch**, select a different option.
  - f. If you want to change the return address of **Use notification library**, select a **Use optional address**, and select from the list.
9. Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up another notice type.

**Related Information**

- Special announcements - Using the Polaris E-Mail Manager, you can send special messages and announcements that are not part of the automated notification process. See [Send e-mail special announcements](#).

- Generating e-mail notices - See [Delivering Notices By E-mail](#).
- Setting up text message notices - See [Delivering Notices by Text Message](#).

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## Printing Notices

You can print overdue, bill, fine, and hold request notices at any time from the **Utilities** menu on the Polaris Shortcut Bar. For overdue and fine notices, a nightly process automatically places the notices in the queue for delivery. The queue for hold request notices is built item-by-item as each item's status changes to Held. After you print the notices, if you choose to "post" the notices, data is written to the database records and the appropriate queue is cleared. These printed notices are produced according to the paper format you specify. If a notice lists too many items to fit on a single form, a second form is generated for the same patron, using the same header text and listing the remaining items. (The Post Card format does not contain specific item information.) The notices are sent to the address in the **Address for notices and bills** field in the patron record (Patron Registration workform - Addresses view). See: [Print overdue, bill, fine, or request notices](#).

You can also print Patron Billing Statements, which list all the current charges on a specific patron's account. You can print these notices for a specific patron or patrons, or on an organization basis, automatically printing a statement of current charges for each patron who owes an amount within a specified range. This statement is intended to help patrons understand exactly what they owe, and does not affect the notices queue in any way. Like other printed notices, Patron Billing Statements are sent to the address in the **Address for notices and bills** field in the patron record. See: [Print patron billing statements](#).

### Print Overdue, Bill, Fine, or Request Notices

To print overdue, bill, fine, or hold request notices:

1. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar (staff client). The Polaris Reports dialog box appears.
2. Expand the **Notices** folder.
3. Select the **Overdues, Holds, or Fines** folder under Notices. The appropriate notices are displayed in the **Available Reports** list.

**Note:**

Mailers in various formats for combined notices are listed individually under **Notices**. Bills are available in the **Overdues** folder.

4. Double-click the notice format you want to print:
  - Full Page Mailer - 8.5 x 11 inches
  - Half Page Mailer - 9 x 5.5 inches, commonly available half-page mailer stock
  - Post Card - 6 x 4 inches
  - Z Fold Mailer - 8.5 x 11 inches, folds so addresses are exposed in window envelope
  - Z Fold Mailer Oversized - 8.5 x 14 inches, folds so addresses are exposed in window envelope

**Note:**

Printed notices designed to be inserted in an envelope are formatted for standard #10 window envelopes.

The Report Setup Wizard appears.

5. Select the organization(s) whose notices you want to run.

**Note:**

The organizations available for selection are set in the **Report server** profile. For more information, see the Polaris Administration PDF Guide, Specify a Server for Reporting Services.

6. Click the **Sorting Options** tab.

**Note:**

Your system's user-defined fields for patron records are included in the sorting options.

7. Select a sorting order in the list on the left, and click the right arrow button.

The field is moved to the list on the right, indicating that it is selected for sorting. You can select more than one field. The notices will be printed sorted by the first field, and within the first field by the second field, and within the second field by the third field.

The reporting branch name is selected by default. If your library or system does not do central notice processing, you may want to leave this option in place. You

can select additional sorting fields. If you do central processing, you may want to move **Reporting branch name** to the left (unselected) list, and instead select a more useful primary sort for mailing—for example, **Patron address zip**. You must select at least one sorting option.

To remove a field from the selected list on the right, select the field and click the left arrow button.

8. Click **Submit**. After a few moments, the notices are generated and the Report Preview window opens.

March 6, 2018				
SOUTHERN ADIRONDACK LIBRARY SYSTEM 22 WHITNEY PLACE SARATOGA SPRINGS, NY 12866-4533				
FINE NOTICE				
Our records show an outstanding fine balance on your account. Please contact the library as soon as possible to resolve these fines.				
<u>Call No.</u>	<u>Author</u>	<u>Title</u>	<u>Txn Date</u>	<u>Amount</u>
		Patron Registration Fee	3/5/2018	\$5.00
			Total Due	\$5.00
CHRIS CLARKE 1ST ST 13219 SYRACUSE				

A message asks if you want to post the notices to the database.

9. Choose one of the following options:
  - Move the message box to one side and decide whether to post after you print the notices.
  - If you are satisfied with the notices in the preview, click **Yes**.

**Important:**

When you click **Yes**, the notices are posted (recorded) as issued, and the appropriate queue for the notice type and branch you chose is cleared. However, the set of notices remains available in your workstation's **My**

**Documents/My Reports** folder, and can be reprinted from that location. The file is overwritten each time notices are generated.


- If you see problems, click **No**. This option allows you to start over, without posting or printing the notices.

**Note:**

You can click the arrows at the bottom of the Report Preview window to see the notices one by one. Or, click the **Pages** tab to see several notices at once.

**Tip:**

You can print a limited range of pages to test the notices. Note that by design, title and author information is limited to 100 characters on all notices.

10. Click the printer icon  to print the notices. The Print dialog box appears.
11. Modify the printer settings, if necessary, and click **OK**. The notices are printed.

**Note:**

If you are printing both English and other language notices, they are interfiled.

12. Close the Report Preview window.

Related Information

- Printing Chinese, Japanese, or Korean notices - If Chinese, Japanese, or Korean notices are printing incorrectly, you may need to install a different printer driver. Check your printer documentation for more information.
- Printing Acquisitions notices - See the Acquisitions PDF Guide, Canceling Orders and Claiming topics.
- Printing Collection Agency Synchronization Report - See [Collection Processing Reports](#).
- Customizing notice text - The default fine notice text for both mailed and emailed notices is: **Our records show an outstanding fine balance on your account. Please contact the library as soon as possible to resolve these fines.** You can use the WebAdmin tool to change the text. The mnemonics are as follows:



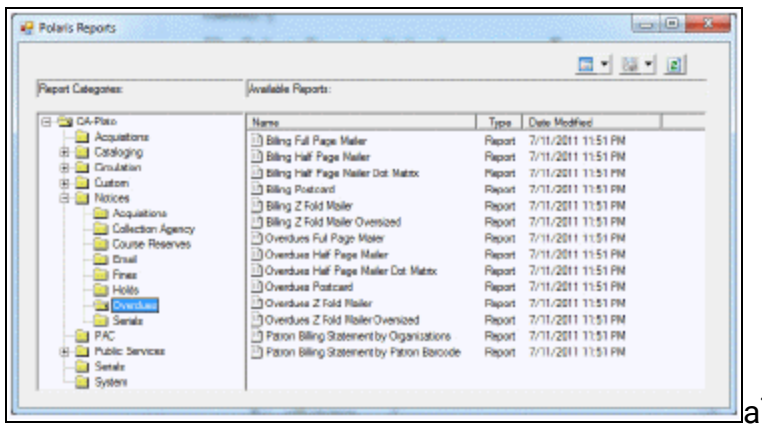
- Printed and Mailed notices: **NT\_FINE\_M\_TEXT**
- Emailed notices: **NT\_FINE\_EM\_TEXT**

### Print patron billing statements

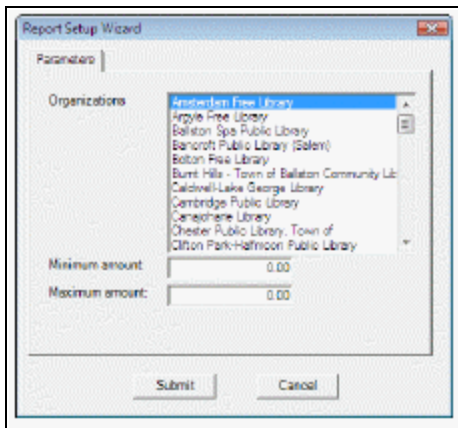
A patron billing statement details all the outstanding charges on a patron’s account. It does not affect the notices queue.

To print patron billing statements:

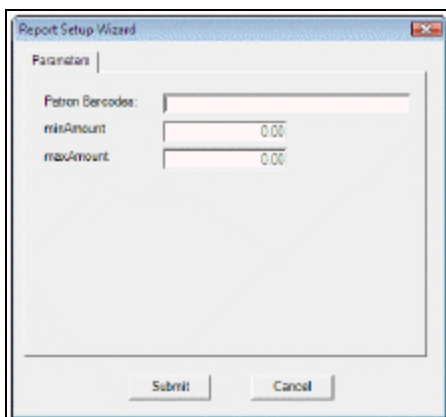
1. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar (staff client). The Polaris Reports dialog box appears.
2. Expand the **Notices** folder.
3. Select the **Overdues** folder under Notices. The notices are displayed in the **Available Reports** list.



4. To print patron billing statements by organization, follow these steps:
  - a. Double-click **Patron Billing Statement by Organizations**. The Report Setup Wizard opens.

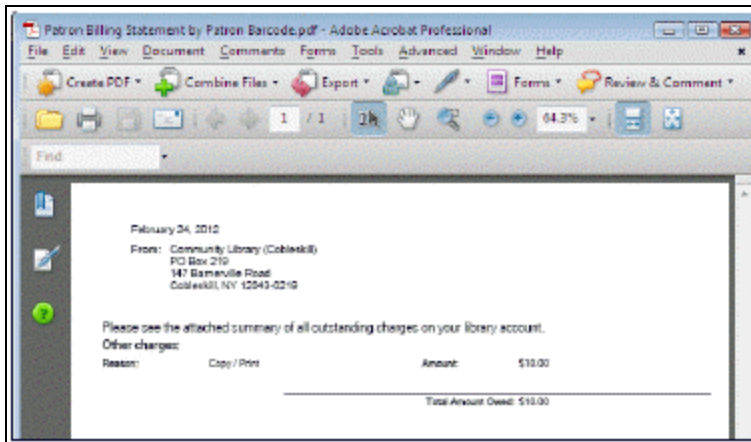


- b. Select the organizations whose patrons should receive a billing statement.
  - c. In the **Minimum amount** box, type the minimum amount of outstanding charges on a patron's record that determines whether a billing statement is generated for the patron.
  - d. In the **Maximum amount** box, type the maximum amount of outstanding charges on a patron's account that determines whether a billing statement is generated for the patron.
5. To print patron billing statements for specific patrons, follow these steps:
- a. Double-click **Patron Billing Statement by Patron Barcode**. The Report Setup Wizard appears.



- b. Type or scan the patron's barcode in the **Patron barcode** box. You can enter multiple barcodes, separated by commas (255 characters maximum). The barcodes are not validated; if you enter an incorrect barcode, a billing statement for that patron will not be generated.


6. Click **Submit**. After a few moments, the statements are generated and the Report Preview window opens.



7. Review the statements, if necessary. You can click the arrows at the bottom of the Report Preview window to see the notices one by one. Or, click the **Pages** tab to see several statements at once.

**Note:**

If you see problems, or change your mind about printing the statements, close the Report preview window.

8. Click the printer icon  to print the statements. The Print dialog box appears.
9. Modify the printer settings, if necessary, and click **OK**. The statements are printed.

---

## Delivering Notices By Email

You can send overdue, billing, fine, hold request, reminder, and routing notices by email.

**Note:**

This section describes Polaris's default functionality for email notices. You can also use the LX Starter package to design, schedule, and email automated circulation notices. For more information, see:

- [Managing Notification](#)
- [LX Starter Administration help](#)

Most email notices are sent automatically by the Polaris E-mail Manager, and posted by the SQL Server job Notice Processing, the job that processes all notices.

**Note:**

A separate SQL job, **Hold Notice Processing**, processes email and text message (SMS) first and second hold notices separately. Designed to run multiple times per day, the job runs every four hours from 9:00 AM to 8:00 PM by default. See [Hold Notice Processing for Email and Text Message Notices](#).

The **To** field in an email notice is taken from the email address field in the patron record. You specify the **From** field, any **Reply To** address, and any footer with the Notification Options parameter. See [Set up notification methods, email options, and export location](#). When you send email notices, the appropriate queue is cleared, the transaction is posted, and a summary report is sent to the email addresses specified when you set up notification. The summary report is also available from the Report Manager. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar to open the Report Manager. In the Report Manager, select **Notices > Email > Email\_SummaryReport**.

Special announcements are free-text email messages, such as for a book sale, that are not part of the automated notification process. You can send special announcements by email manually, using the Polaris E-mail Manager utility. See [Send email special announcements](#).

The default email format is HTML. However, certain email servers send HTML messages in odd format, or insert strange characters in the messages. You can specify plain-text format for specific patrons through an option in the Patron Registration workform - General view. See the Patron Services PDF Guide, Add general data to a patron record. You can also set plain text as a default setting in new patron records. See [Setting Patron Registration Required Fields and Defaults](#) and [Setting Express Registration Defaults and Requirements](#).

**Note:**

Plain-text email notices have the following limitations:

- Detailed content is displayed in separate lines instead of in one line or one group.
- Combined notices may include some fields that are correctly suppressed in HTML notices.

### Email Failure Detection

Before email notices are sent to patrons, an internal test message is sent to the Reply-to email address if available; otherwise, the test message is sent to the **From** address specified in the **Notification options** parameter. This message verifies the SMTP connection and notifies the sender application that email processing will run. The reporting server connection is also checked. If the SMTP connection or reporting server connection cannot be verified, the email notices are not generated or sent. Failures are recorded in the PolEmailManager program log file: **[server]\PolarisProgramData\[version]\Logs\POLEMAILMANAGER**

The notices are not posted, and are re-sent the next time notices are processed.

If an email notice is sent but fails due to a poorly formatted email address, or the recipient server rejected it, the failure is recorded in the notification log and the notice set to print instead. It is then posted with the rest of the printed notices when they are run. These failures are listed in the **Email delivery failure report** available from the Polaris Shortcut bar. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar to open the Report Manager. In the Report Manager, select **Notices, Email delivery failure** to list any failed email notices. You can filter this report by date and reporting branch.

**Note:**

This process does not apply to reminder notices. When a reminder email

notice fails due to an invalid email address, it is posted and not sent to print.

An email notice may be sent but fail due to reasons other than being poorly formatted or rejected by the recipient mail server. These failures can occur, for example, when a mailbox is busy or temporarily unavailable. In this case, the notice is not posted and is re-sent the next time notices are processed.

**Note:**

If no patrons receive scheduled email messages, the SMTP server may not be set up properly. For help with SMTP installation, see your Windows server help file.

### Automatic Email Report

You can set Polaris to send a report to one or more email addresses after the notices are generated. The report includes the starting and completion date and time, the number of notices of each type that were generated, and the name, barcode, and email address (if any) of each recipient. See [Set up notification methods, email options, and export location](#).

### Set up e-mail notification prerequisites

To prepare Polaris for e-mail notification:

1. In Polaris Administration, set the PAC profile **Email notification: Server running SMTP service** for the organization. Use the computer name where the SMTP service is installed.
2. On the Polaris database server, create a desktop shortcut to **/Program Files/Polaris/[version]/Bin/PolEmailManager.exe**. The **PolEmailManager.exe** utility is used to send special announcement e-mail messages.
3. Set up reverse DNS in Active Directory for your network. Reverse DNS is used to authenticate a sender's address with the domain. This step helps ensure your patrons will receive their e-mail notices. As a security measure, certain Internet service providers block e-mail to their users if they cannot find the sending server.

## Send e-mail special announcements

Most e-mail notices are run automatically by the SQL Server job Notice Processing. However, you can send special announcements manually.

**Note:**

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately. See [Hold Notice Processing for E-Mail and Text Message Notices](#).

To send special announcements by e-mail:

1. Be sure that e-mail prerequisites have been set up. See [Set up e-mail notification prerequisites](#).
2. On the Polaris database server, double-click the desktop shortcut to **/Program Files/Polaris/[version]/Bin/PolEmailManager.exe**. The Polaris E-mail Manager dialog box appears.
3. Type a topic for the message in the **Subject** box (1,000 characters maximum).

**Tip:**

Particularly for longer messages, you may want to create the message text in a word processor, spell-check the text, and save it as a text file. Then copy and paste the message into the Polaris Email Manager.

4. Type the announcement text in the **Message** box. (You may want to add "Please do not reply to this message.") The maximum message size is 64 KB.
5. Click **Send** to send the message. The special announcement is sent to all patrons with a valid e-mail address.
6. Click **Close** to exit the Polaris E-mail Manager dialog box.

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## Delivering Notices by Text Message

Text message notices to patrons' mobile phones are sent as part of normal notice processing. You can send notices by text message alone, or in addition to another method. For example, you can send a request notice by text message only, or by conventional e-mail with an additional text message. As with other notification methods, you can set text messaging as the patron's preferred notification method in the Patron Registration workflow.

Text messages are sent by the Polaris E-mail Manager as part of conventional e-mail notice processing. They are included in the Summary Report as a separate notification category. For more information about e-mail notice setup and processing, see [Delivering Notices By E-mail](#).

### **Note:**

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately. Designed to run multiple times per day, the job runs every 4 hours from 9:00 a.m. to 8:00 p.m. by default. See [Hold Notice Processing for E-Mail and Text Message Notices](#).

Successful text message notices are posted and the appropriate patron and item records are updated accordingly. Failed text message notices where text message is the specified notification method are converted to print. Failed "additional" text messages are not converted.

### **Text Message Notice Delivery Failure Report**

The report TXT Delivery Failure Report is available from the Polaris Shortcut Bar. To access the report, select **Utilities > Reports and Notices** (Notices folder). The report lists all failed TXT notices for a specified time period for selected or all organizations. The organizations are the notification branches (the branches responsible for sending the notices). TXT notice failures may be detected for empty e-mail body content or SMTP server failure. A message that cannot be delivered because the address has



changed or the remote server does not respond (a delivery failure) is not included in this report.

For each failure, the report lists the patron's barcode, branch, and name; the phone carrier and the carrier's SMS e-mail address; the failure reason and failure date. If multiple failed notices were generated to the same patron during the specified time period, the patron is listed multiple times.

### **Patron Record Settings for Text Message Notices**

To enable patrons to receive notifications by text message, the **Send additional TXT message** checkbox must be selected for the notice type on the corresponding tab of the Notification options dialog box (**Parameters > Notification** in Polaris Administration). When the **Send additional TXT message** checkbox is checked for the notice type, and the Registration workform for the patron has a mobile phone number and carrier entered for text messaging, an additional text message will be sent. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number and carrier, the **Send additional TXT message** checkbox is automatically checked on the Registration workform. If e-mail reminder notices are set up for the library organization, and the patron's registration does not contain an email address but does contain a phone number and carrier for text messaging, reminder notices will be sent to these patrons unless they opt out.

- **Phone 1, Phone 2, or Phone 3** entry, with **TXT** checked and a carrier selected from a drop-down list for the phone entry. The available carriers are set in Polaris Administration. See [Specify available carriers for phone and text messages](#).

Patron Registration - 357291 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: 987654321 Registered at: Community Library (Cobleskill) (C06)

Last name: Farsad Patron code: Regular

First name: Timothy  Instructor (Primary)

Middle name: Janea Expiration: Terms: 0 Date: 2/10/2013

Title: Suffix:

Type	Street One	Street Two	City	State	Zip Code	County	Country
Home	419 First St		LIVERPOOL	NY	13088	ONONDAGA	USA
Work	314 Second St		LIVERPOOL	NY	13088	ONONDAGA	USA

Address Check: Terms: 0 Date: 2/10/2011

Address/bill address: Home

Notification option: **TXT message**  Additional TXT notice

eReceipt option: Home

Email address: liverpoolstorkin@yahoo.com altEmail address:

Phone 1: 315-401-2622  TXT

Phone 2: 315-123-4567 Verizon

Phone 3:

FAX number:

For Help, press F1 NLM

- To set text messaging as the patron's preferred notification method, select **TXT message** from the **Notification option** drop-down list.

**Note:**

The default notification settings for normal and express patron registration are controlled by the Patron Services parameters **Patron registration options** and **Express patron registration options** respectively. You can select **TXT Messaging** as the default notification option for either or both of these parameters.

Patron Registration - 357251 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: 087554321 Registered at: Community Library (Cobleskill) (C06)

Last name: Farsad Patron code: Regular

First name: Timothy

Middle name: Janea

Title: Suffix:

Instructor (Primary)

Expiration: Terms: 0 Date: 2/10/2013

Type	Street One	Street Two	City	State	Zip Code	County	Country
Home	419 First St		LIVERPOOL	NY	13088	ONEIDA	USA
Work	314 Second St		LIVERPOOL	NY	13088	ONEIDA	USA

Address Check: Terms: 0 Date: 2/10/2011

Home/Bill address: Home

Notification option: **TXT Messaging**

Additional TXT notice

efileopt option: Home

Email address: liverpoolhistorian@yahoo.com

Phone 1: 315-401-9679

Phone 2: 315-123-4567

Phone 3:

FAX number:

For Help, press F1

- Select **Additional TXT notice** if you plan to send text messages in addition to another notice format. For example, the first overdue notice may be sent by e-mail and an additional text message. This option must be checked both in the Notification options parameter for the type of notice and in Registration workform for the individual patron.

**Note:**

Additional text message notices do not appear in the patron's notification history.

Patron Registration - 357291 - Addresses - Polaris

Barcode: 087554321

Last name: Farsad

First name: Timothy

Middle name: Janea

Title: \_\_\_\_\_ Suffix: \_\_\_\_\_

Registered at: Community Library (Cobleskill) (C06)

Patron code: Regular

Instructor (Primary)

Expiration: \_\_\_\_\_ Date: 2/13/2013

Terms: 0 \_\_\_\_\_

Type	Street One	Street Two	City	State	Zip Code	County	Country
Home	419 First St		LIVERPOOL	NY	13088	ONEIDA	USA
Work	314 Second St		LIVERPOOL	NY	13088	ONEIDA	USA

Address Check

Terms: 0 \_\_\_\_\_ Date: 2/13/2011

Home/bill address: Home \_\_\_\_\_

Notification option:  Additional TXT notice

eReceipt option: Home \_\_\_\_\_

Email address: liverpoolhistory@yahoo.com

Phone 1: 315-401-9679

Phone 2: 315-123-4567

Phone 3: \_\_\_\_\_

FAX number: \_\_\_\_\_

## Text Message Content

You can edit text message notices in Polaris WebAdmin (Language Editor). If you edit the messages, be aware of these rules:

- Character limit - Individual messages are limited to 160 characters including the subject line, if specified, and the sender's address if the carrier includes it. Longer messages may be split and sent as multiple messages.
- URLs - You can include a URL in the message, but note that the URL takes up message space and the link may not be active, depending on the patron's carrier.
- Languages - Text messaging does not support Unicode, so text message notices in languages with diacritics are not rendered accurately.

For more information about editing notices and a list of default text message notices, see the Polaris WebAdmin (Language Editor) Guide or WebAdmin online Help.


## Specify available carriers for phone and text messages

You set up the list of possible mobile phone carriers for conventional phone and text messages in Polaris Administration. The carriers you specify are then available for selection in the Patron Registration workflow and when patrons register or update their account information from the PAC.

To set up text message carriers:

**Note:**

You need the system-level System Administration permission **Modify mobile phone carriers: Allow** to work with this table.

1. In the Administration Explorer tree view, open the **Database Tables** folder for the system, and select **Mobile Phone Carriers**. The Mobile Phone Carriers table is displayed in the details view.
2. To add a carrier, click  to display the Insert Mobile Phone Carriers dialog box.
3. Type the carrier display name in the **Carrier Name** box (100 characters maximum). This name will appear in the drop-down list of carriers on the Patron Registration workform and the PAC self-registration and contact information update forms.
4. Type the carrier's SMS (text messaging) address in the **SMS Address** box (100 characters maximum). Addresses must include the @ sign, which can appear anywhere in the field. This exact address will be used to send text message notices to patrons who use this carrier.

**Examples:**

AT&T - **@txt.att.net**


Verizon - **@vtext.com**

T-Mobile - **@tmomail.net**



5. Set the **Display** setting to **Yes** to display this carrier in the lists of carriers, and click **OK** on the dialog box. The Mobile Phone Carriers database table appears with the new carrier entry. The status bar indicates that the modification is pending.

**Tip:**

Polaris provides a list of common carriers in the table. Use this method to suppress a carrier that you do not want to display for selection.

6. To change a display setting, follow these steps:
  - a. Select the carrier and click . The Modify Mobile Phone Carriers dialog box appears.
  - b. Set the **Display** setting to **Yes** or **No**, and click **OK** on the dialog box.
7. Select **File > Save** to save your changes. The status bar indicates that the record is saved. New carriers are available as options for every organization in the system.

**Related Information**

- Modify a table entry - Select an entry, click , and edit the entry. To delete an entry, select the entry and click .

**Note:**

If the modification or deletion would cause an existing setting to be invalid in a patron record, you receive a warning message when you attempt to save your changes. If you choose to continue, the carrier is set to **None** in the patron record and text message notices will not be delivered.

- Setting patron self-registration options - See the Public Access Administration PDF Guide, Setting Patron Account Options.

## Setting Up SIP Self-Check Circulation

Polaris supports two types of self-check systems: those that rely on SIP protocol as the interface between the self-check unit and Polaris, and Polaris® ExpressCheck™ units, which interact with Polaris directly.

**Note:**

Polaris ExpressCheck workstations and the client application are available through contract from Innovative Interfaces. Some of the self-check material types in the [Self-Check Material Types policy table](#) also apply to ExpressCheck. For information about setting up Polaris ExpressCheck units, see the Polaris ExpressCheck Administration Guide.

SIP self-check units have specific media classifications for each material type the library circulates via self-checkouts. When you are setting up the self-check interface, you associate each Polaris material type with a self-check media type; indicate whether the media is magnetic and if the security strip can be desensitized; if necessary, block certain material types from being checked out; and specify the item circulation statuses that you do not want to block circulations.

To set up self-check circulation in Polaris, do the following:

- Use the Self-Check Material Types policy table to [associate Polaris material types with self-check media types](#).
- Use the SIP Payment Types policy table to [associate SIP payment types and Polaris payment methods](#).
- Use the SIP [Self Check Unit parameters](#) to:
  - Identify the staff member for self-check unit transactions.
  - Specify the staff login ID and password
  - Identify conditions that block patrons from checking out items
  - Identify conditions that prevent items from being checked out
  - Specify the messages that appear on the self-check unit screen and on printed logs

- Specify other self-check unit operating conditions, such as the number of retries allowed, the inactivity time-out period, and whether patron passwords are required

---

## Add a self-check material type entry

Self-check material types can be set from the system, library, and branch levels, but the same self-check material types are shared by all organization levels and are assigned to the system organization record. To add a self-check material type to the Self-Check Material Types policy table:


**Note:**

These System Administration permissions are required to work with the SelfCheck Material Types table: **Access administration: Allow, Access tables: Allow, Modify self check material types table: Allow.**

1. In the Administration Explorer, open the Policy Tables folder for the organization, and select **SelfCheck Material Types**. The SelfCheck Material Types table is displayed in the details view.

**Note:**

The Self-Check Material Types policy table is displayed from the Administration Explorer only. You cannot access the table from an organization workflow.

2. Click  to display the Insert Self Check Material Types dialog box.
3. Select a Polaris material type in the **Material Type** box.
4. In the **Self Check Media Type** box, select the self-check media type to associate with the material type displayed in the **Material Type** box.

**Note:**

If one of your Polaris material types does not closely match a self-check media type, use the **Other** media type.

5. In the **Is Magnetic** box, indicate whether the material type is magnetic by choosing one of the following options:



- If the material type is not affected by magnetic fields, select **No**.
- If the material type is a magnetic medium, such as a video tape or cassette tape, select **Yes**.
- If you are not sure if the media can be damaged by magnetic fields, select **Unknown**.

**Note:**

Polaris ExpressCheck client software supports RFID, electromagnetic (EM), and AVLocker security options. If you use Polaris ExpressCheck on hardware with electromagnetic (EM) strip security, your setting for **Is Magnetic** also applies to Polaris ExpressCheck.

6. In the **Can Desensitize** box, indicate whether the security strip for the material type can be desensitized by choosing one of the following options:
- If the material type is not a magnetic medium, has a security strip, and can be desensitized, select **Yes**.
  - If the material type is a magnetic medium, such as a video tape or cassette tape, select **No**.
  - If the material type is not circulated, select **No**.
  - If you do not know if the material type can be damaged by magnetic fields or if it has a security strip, select **Unknown**.

**Note:**

Polaris ExpressCheck client software supports RFID, electromagnetic (EM), and AVLocker security options. If you use Polaris ExpressCheck on hardware with electromagnetic (EM) strip security, your setting for **Can Desensitize** also applies to Polaris ExpressCheck.

**Important:**

The Polaris Security Manager is automatically installed if you select RFID, electromagnetic (EM), or AV Locker security options while installing Polaris ExpressCheck, or RFID while installing the Polaris staff client. TCP port 8075 is used by the Security Manager. This port must be open if any security measures (RFID, EM, AV Locker) are used.

7. In the **Is Blocked** box, choose one of the following options to indicate if items of this material type can be checked out at a self-check unit:
  - If the material type can be checked out with a self-check unit, select **No** (not blocked).
  - If the material type must be checked out by library staff or cannot be checked out at all, select **Yes** (blocked).

**Important:**

Your blocked settings also apply to check-outs from Polaris ExpressCheck.

8. In the **Double Sided** box, specify whether both spine and main magnets should be used when desensitizing an item.

**Note:**

Polaris ExpressCheck client software supports RFID, electromagnetic (EM), and AVLocker security options. If you use Polaris ExpressCheck on hardware with electromagnetic (EM) strip security, your setting here also applies to Polaris ExpressCheck.


9. In the **Unlocker** box, specify whether the AV security locker should be opened following a checkout of this material type.


**Note:**

This setting applies only to Polaris ExpressCheck client software installed on a workstation with the AV locker security option.

10. If you use EnvisionWare RFID, select the Danish Data Model (DDM) format for this material type in the **DDM Media Format** box.
11. Click **OK** on the dialog box. The Self Check Material Types table is displayed with the new entry. The status bar indicates that the modification is pending.
12. Select **File > Save** to save your changes.

**Related Information**

- Modify a table entry - Select the entry and click . You can change all elements in the self-check material type entry. Any changes made to an entry are applied to all organizations in Polaris.

- Delete a table entry - Select the entry and click . Removing an entry at any organization removes the entry from all organizations.
- Polaris material types - See [Defining Material Types](#).
- EnvisionWare RFID and DDM media formats - Go to [http://www.envisionware.com/en/ddm\\_use](http://www.envisionware.com/en/ddm_use).
- Polaris ExpressCheck setup - See the Polaris ExpressCheck Administration Guide.

## Set SIP self-check parameters

Self-check parameters can be set at the system, library, and branch level. Each organization level may have a different set of parameters, depending on where the self-check units are installed. Set the parameters at the System level if your library system has a single self-check unit installed or if all your self-check units use the same settings. If each branch uses the units differently, set the parameters at the branch level only.

To set self-check parameters:

### Tip:

You can work with self-check parameters from the Administration Explorer or from an organization workflow. The self-check unit does not need to be installed to set the self-check parameters in Polaris Administration.

1. In the Administration Explorer tree view, expand the organization folder and select **Parameters**.
2. Select the **SelfCheck Unit** tab in the details view.
3. Set **Allow SIP processing** to **Yes**.
4. Set the following system identification parameters:
  - **Assigned staff member** - The library staff member listed for self-check circulation transactions.
  - **SIP default workstation**
  - **SIP Login Password** - The staff password needed to log in to self-check.
  - **SIP Login User ID** - The staff user name needed to log in to self-check.
5. Select the **Default security** marker value, and choose the type of security marker your library uses. Select **None** if your library does not use security markers.

6. Double-click **Patron blocks** to open the dialog box, and set and save the patron block options:

- **Free text blocks** - This parameter affects the SIP messages Patron Status and Patron Information. Many SIP check-out devices check the Patron Status or Patron Information message before attempting to perform a check-out. On these devices, if this parameter is selected, a patron with free text blocks will be blocked from checkout. Checked by default (patron will be blocked).
- **Library-assigned blocks** - Selected by default (patron will be blocked).
- **Blocking notes** - Selected by default (patron will be blocked).
- **Associated patron blocks** - Blocks SIP self-check transactions by patrons with blocked associated patron records. See Associated Patron Blocking. Cleared by default (patron will not be blocked if associated patrons are blocked).
- **Collection agency blocks** - Blocks SIP self-check workstation transactions by patrons with collection agency blocks. Selected by default (patron will be blocked).
- **Verify patron data block** - Blocks SIP self-check workstation transactions for patrons whose records require verification.
- **Maximum claims** - Blocks patrons who have exceeded the number of claims in this box.

7. Double-click **Check-out: item options** and set and save the following item options:

**Note:**

SIP circulation uses the settings in the Patron/Material Type Loan Limit Blocks policy table to determine check-out blocks based on maximum items out, material type limits, maximum overdues, and similar settings. See [Defining Loan and Request Limit Blocks](#). Material type group limits also apply to SIP circulation. See [Defining Material Type Group Limits](#).

- **Deny checkout if item is from another branch** - If selected, items from other branches cannot be checked out from the unit.
- **Allow check-out of items with free text blocks** - If selected (default), an item with a free text block can be checked out. If cleared, items with free text blocks cannot be checked out.

- **Allow check-out of items with library-assigned blocks** - If selected (default), an item with a library-assigned block can be checked out without interruption. If cleared, items with a library-assigned block cannot be checked out.
  - **Allow check-out of items with the selected circ statuses** - Select the circulation statuses that you want to allow to circulate via the self-check unit.
8. Set the additional options to control self-check circulations:
- **Allow checkouts during renewal** - Permits a patron to check out an item that is recorded as already checked out to another patron.
  - **Checkins ok** - Permits checkin at the self-check station.
  - **Checkouts ok** - Permits checkout at the self-check station.
  - **Deny checkout if there are notes** - Prevents check-out if the patron record has a Blocking note.
  - **Check-in: Item blocks, allow checkin** - Permits checkin at the self-check station even if the item has blocks (system, library assigned, and free text).

**Note:**

This option does not impact the SIP functionality that sends items with missing parts to the exceptions bin.

- **Holds ok** - Permits hold requests at the self-check station.
- **Renewals ok** - Permits renewals at the self-check station.

**Note:**

Renewals via SIP are blocked as they would be in PAC, according to the thresholds set in the Patron Services profile **Patron initiated circulation: Blocking conditions**.

**Note:**

To prevent check-out of specific item material types, use the Self Check Material Types policy table. See [Add a self-check material type entry](#).

9. If your library charges for checkouts/renewals, double-click **Check-out: Charge options** to open the dialog box, and set and save the following options for items that are chargeable:

**Note:**

The system uses the SIP settings for the workstation's branch, but uses the chargeable settings for the item's assigned branch. For more information about setting up charges for checkout and renewal, see [Charging for Checkout and Renewal](#).

- **Allow check-out if item is chargeable**
- **Allow renewal if item is chargeable**
- **Auto-charge for renew all**

**Note:**

If the material type is blocked from check-out at SIP self-check units, that setting takes precedence over any chargeable policies and the transaction is stopped.

10. Set these parameters to **Yes** or **No** to specify whether claimed items can be checked in at the self-check unit:
  - **Check-in: Claim Never Had, allow checkin**
  - **Check-in: Claim Returned, allow checkin**
11. Set the following self-check operational conditions as needed:
  - **SIP uses patron passwords** - Requires patron passwords for patrons to use self-check.
  - **Retries allowed** - Number of times the self-check unit attempts to resend a message to the client workstation. Retries may be attempted when there are network problems or if the client software goes offline.
  - **Time-out period: 000 (none) - 999 (not known)** - Number of seconds (in tenths of a second) that the self-check unit pauses before retrying or canceling a transaction that does not receive a response from the client software.
  - **Status update ok** (can block a patron, etc.) - Permits a patron's status to be updated, allowing the unit to create a patron block under limited circumstances. For example, if the self-check unit is equipped to detect tampering (such as swapping out books in a stack) or if the patron forges a card, the unit applies a free text block to the patron record (Patron was blocked by a selfcheck unit) and stops the checkout. Set this option to **Yes**. It facilitates

testing in some situations and has no impact on check-out processing in units that do not have tamper detection.

- **Use error correction** - Permits a checksum and sequence number at the end of every message sent to and from the software, which helps maintain data integrity and assists in troubleshooting. The recommended setting is **Yes**.
  - **SIP2 extensions enabled** - Enables specific SIP2 functionality for the self-check units of certain vendors. If you are not sure what your equipment requires, contact your Polaris Site Manager to determine if this parameter should be set to **Yes**.
12. Allow or prevent messages by setting these parameters:
- To allow messages to be printed on receipts, set **Use printer messages** to **Yes**.
  - To allow messages to be displayed on the screen, set **Use screen messages** to **Yes**.
13. Add *You Saved* messages (see [Set SIP self-check parameters](#)) to receipts with these settings:
- Set *You Saved* options. See [Set SIP self-check parameters](#).
  - To include the *You Saved* message in the self-check printed receipt, set **Use printer messages** to **Yes**, and set **Check-out: Append you saved message to Checkout Printer message** to **Yes**
  - To include the *You Saved* message in the self-check screen display, set **Use screen messages** to **Yes**, and set **Append you saved message to Checkout Screen message** to **Yes**.
14. Specify the messages that the self-check unit supports by setting the appropriate **System supports the . . . message** parameters to **Yes** or **No**:

**Note:**

These controls refer to messages defined in the SIP protocol and determine which ones are sent as part of normal SIP processing. Refer to the SIP standard for message definitions. All message parameters should be set to **Yes** unless your Polaris Site Manager specifically instructs otherwise.

15. To change the text for any of the printer or screen messages, double-click the appropriate message parameter value, type a new message over the existing value and press **Enter**.

16. Select **File > Save** to save the settings. **Save complete** appears in the status bar.

See also:

[Self-Check Parameters Reference](#) - Lists and describes all self-check unit parameters.

[Managing Hold Requests](#) - The following settings on the Holds options dialog box apply to self-check units as well as the staff client:

- **Trap at check-out** on the Staff Client & PAC tab
- **Unclaimed requests, Delete** on the Terms tab

[Waiving Fines Automatically at Circulation](#) - The settings for the following Patron Services parameters affect SIP self-check units as well as the staff client:

- **Overdues: Clear fine if recovered at check-out**
- **Overdues: Clear fine if recovered at renewal**

[Defining Loan and Request Limit Blocks](#) - SIP self-check units use your library's settings in the Patron Loan and Request Limits table for maximum fines, items out, items overdue, and request limits.

## Set SIP payment types and Polaris payment methods

To set SIP Payment Types and Polaris Payment Methods:

**Note:**

By default, no values are specified for the SIP Payment Types.

1. In the Administration Explorer tree view, open the Policy Tables folder at the System level, and select **SIP Payment Types**. The SIP Payment Types policy table appears.
2. Select a form of payment from the **SIP Payment Type** column.
3. Double click on the payment method. The **Modify: SIP Payment Types** dialog box opens.
4. Select a Polaris Payment Method from the drop-down list box. Only one Polaris Payment Method may be selected for each SIP Payment Type, but a Polaris Payment Method can be assigned to more than one SIP Payment Type. Additionally, the Payment Type value can be blank.



**Note:**

The default value is set to blank, with no value assigned. The table is pre-populated by an alterscript provided by Polaris.

5. When complete, click **OK**. The payment type is updated.

## Managing Offline Circulation

Your library can use Polaris offline when the Polaris server is not accessible, such as during an upgrade or when you use the Bookmobile. The offline files contain the transactions that occurred while the workstations were disconnected from the main server.

To manage offline circulation in Polaris Administration, you can set up a highly automated process that copies and retrieves the offline transactions from the workstations and automatically loads them into the database, or you can opt for a more manual process for transferring and uploading the transaction files.

With either the manual or automated offline process, the offline files PolPatron.mdb and PolSystem.mdb must first be copied from the server to the workstations that will be used offline. These .mdb files are updated automatically each night by the Offline Extract SQL job, but if you are copying the files to the workstations at a time other than the beginning of the day, you must run the job manually to ensure that the files are updated.

After the .mdb files are updated, you can copy them from the server to the designated offline workstations manually or automatically. To copy the .mdb files automatically, you must enable the Copy Offline Files SQL job, which automatically updates the offline files on designated workstations. The job is disabled by default because it must be run under an account that has rights to copy the files to the local workstations on a network. To create the account, first create a SQL Server credential and then create a proxy account that associates this credential with the process that allows access to the workstations. The credential name and proxy name can be anything you choose.

If your library is implementing automated offline processing, whereby the offline transaction files are uploaded automatically to the server, you must also set up a credential and proxy to allow this process.

The procedure staff use when working offline is the same whether your library is set up for manual or automatic uploading of the transaction files.

**Important:**

The procedures described in this unit differ for Polaris Hosted customers.

Polaris Hosted customers can find specific instructions for installing the Polaris staff client and working offline on the Polaris Hosted Utilities page or the Innovative Customer Supportal (<https://support.iii.com>).

To use the Automated Offline process, the Polaris system used for offline processing must be directly accessible by the SQL Server where the Copy Offline and the Automated Offline jobs and processes are executed.

In a Polaris library with their databases running in a hosted environment, the workstations designated for offline processing must be directly connected to the SQL server to use Automated Offline. If the Polaris client is installed on a local workstation that is *not* connected to a terminal server via a Remote Desktop connection, the user must manually copy the .mdb files to work offline and must also manually copy the transaction files.

For information on the steps you must take to ensure that the offline workstations are prepared for offline transactions, whether you are implementing the automatic upload process or using the manual upload process, see:

- [Manually update the offline .mdb files](#)
- [Enable automatic copying of .mdb files from the server to offline clients](#)
- [Copy files from the server to the offline client manually](#)

If you are implementing automated offline processing, see [Setting Up Automated Offline Processing](#)

If you are implementing offline circulation with manual uploading of transaction files, see [Setting Up Offline Circulation for Manual Uploading](#).

For procedures staff members use when working offline, whether the transactions are uploaded automatically or manually, see [Working Offline](#).

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## Manually update the offline .mdb files

The Offline Extract job runs automatically each night, but you need to run it manually if, for example, you want to start using offline Polaris in the middle of the day and include that morning's transactions in the offline database.

To manually run the SQL Server job that updates the offline files:

**Note:**

This procedure does not apply to Polaris Hosted customers. Contact your Polaris Site Manager if it is necessary to update the offline files manually. Polaris Hosted customers can also find specific instructions for working offline on the Polaris Hosted Utilities page or the Innovative Customer Supportal (<https://support.iii.com>).

1. From any in-library client with SQL Server, display the SQL Server Enterprise Manager window.
2. Select the production server, and display the contents of the following folder: Management\SQL Server Agent\Jobs
3. Right-click the **Offline Extract job**, and select **Start job** from the context menu. The job runs, and the offline files are updated.

## Copy files from the server to the offline client manually

**Note:**

Instead of manually copying the .mdb files, you can set up a job to automatically copy the .mdb files from the server to all the designated offline workstations. See [Enable automatic copying of .mdb files from the server to offline clients](#).

To copy files from the Polaris server to the offline client manually:

**Note:**

The Offline Extract Job runs automatically each night, but if you are copying the offline Polaris files from the server at a time other than at the beginning of the day, manually run the SQL Server task, **Offline Extract job**. See [Manually update the offline files](#).

1. Select the following files in the **ProgramData\Polaris\[version]\Offline** folder on your library's server:
  - **PolPatron.mdb**
  - **PolSystem.mdb**
2. Copy the files to one of the following folders in the offline client:

- If no datalink is used: Local drive:\ProgramData\Polaris\[version]\offline. This folder is created by default when the staff client is installed. If you are using multiple offline clients, you must copy the .mdb files to each offline client.
- If a datalink is used:Local drive:\ProgramData\Polaris\[version]\datalink\offline

**Note:**

Administrators can override the default location with a registry entry, and create a convenient location in a common area such as a network share. First create a **Polaris** or **UDL instance** (if there is one) folder at that location. However, do not include the new folder in the registry entry, because it is automatically appended. The registry entry should consist of **network path\offline**.

See also: [Working Offline](#).

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## Enable automatic copying of .mdb files from the server to offline clients

**Note:**

Each night, the SQL job **OfflineExtract** updates the .mdb files automatically. If you are setting up offline Polaris at a time other than at the beginning of the day, you must manually run the SQL Server job to update the .mdb files before copying them to the offline client(s). See [Manually update the offline .mdb files](#).

No matter whether your library is setting up offline processing to upload the offline transaction files manually or automatically, you first need to copy the **PolPatron.mdb** and **PolSystem.mdb** files from the server to the designated offline workstations, either by manually copying the files or copying them automatically.

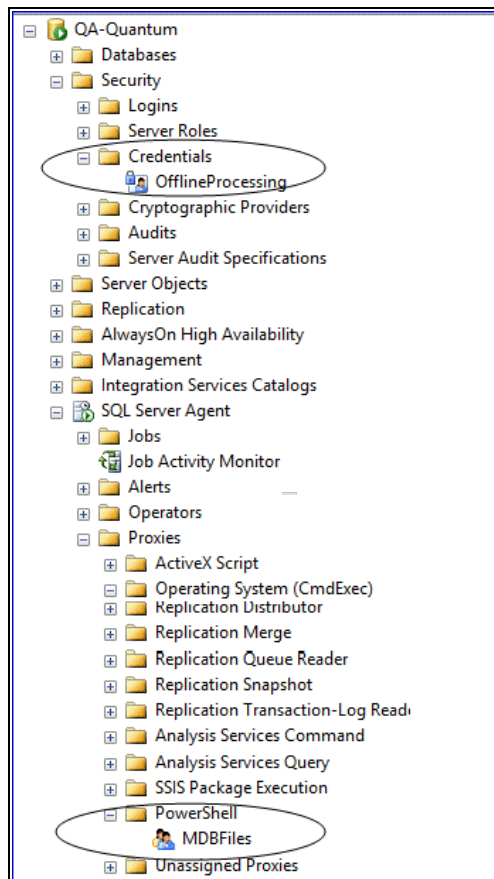
To enable the Copy Offline Files job that automatically copies the . mdb files from the server to the designated offline workstations, you must create a SQL Server credential, then create a proxy account to associate this credential with the process, so that it can access and update the designated offline workstations. The credential name and proxy name can be anything you choose.

**Note:**

If you are using automated offline processing, you must also create a credential and proxy to allow the automatic upload process. See [Enable and schedule the Automated Offline SQL job](#).

To enable the **Copy Offline Files** job to automatically copy .mdb files from the server to the designated offline workstations:

1. Create the SQL Server credential. The credential account must be a domain account that has rights to the domain workstations to which the job will copy the .mdb files.
2. Then create the proxy under **PowerShell**.



Once the credential and proxy are set up, the SQL Agent can copy the .mdb files from the server to the designated workstations.

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## Setting Up Automated Offline Processing

With automated offline processing, libraries can automatically retrieve offline files from library workstations and load them into the database without library staff intervention. When automated offline processing is enabled via a system-level parameter, all transactions (files with a .TRN extension) for patron registrations, check-ins, and check-outs are pulled from the designated offline workstations to the server.

**Note:**

The designated offline workstation could include a terminal server located on the same network as the library's SQL server.

The process then uploads the transactions to the Polaris database, renames the .TRN files with a .DON extension, and logs the results of the upload. Upload logs are generated for each branch or for all offline branches, and then the logs are emailed to specified staff members.

**Note:**

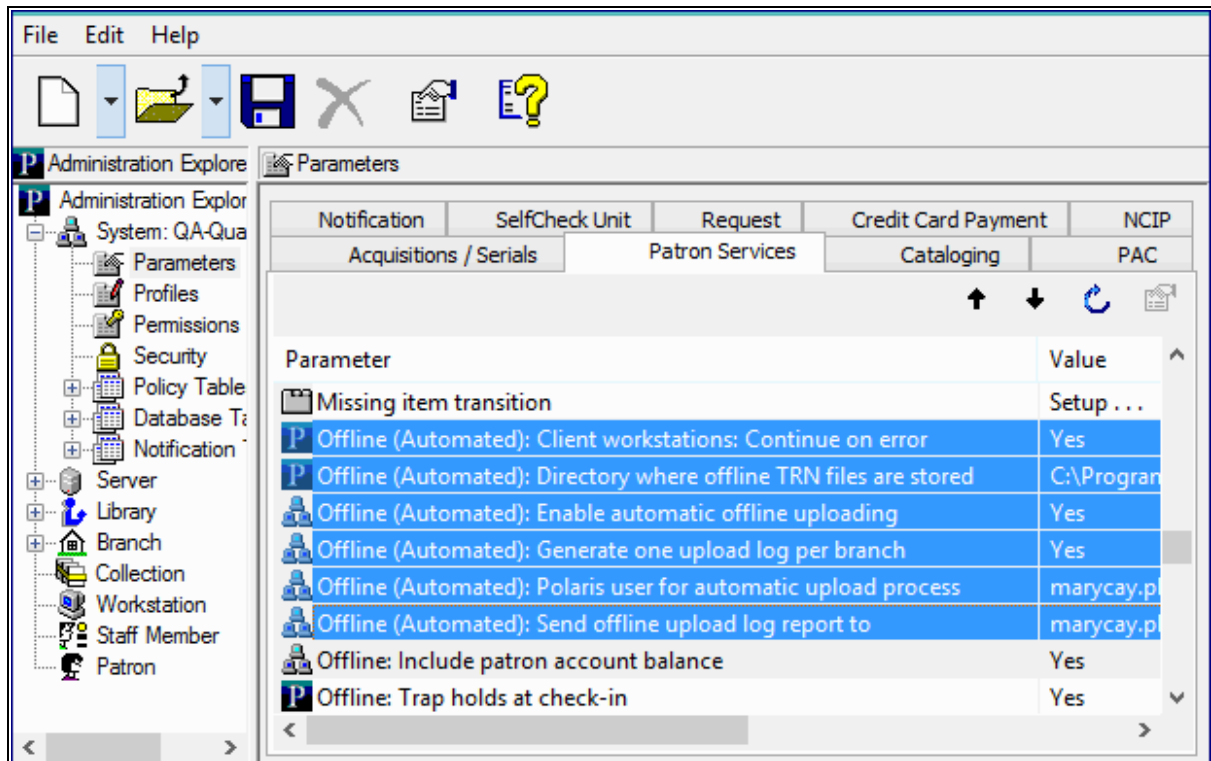
When calculating fines for uploaded check-in transactions, the system uses the number of days specified in the Patron Services Administration parameter **Free days (bulk)**.

See also:

- [Set up Offline \(Automated\) Parameters](#)
- [Enable and schedule the Automated Offline SQL job](#)
- [Automated offline log processing](#)
- [Working Offline](#)

### Set up Offline (Automated) Parameters

To set the Offline (Automated) parameters, open the Administration Explorer, select **System**, select **Parameters** and select the **Patron Services** tab.



- **Offline (Automated): Client workstations: Continue on error** - This System-level parameter is used to specify whether to continue or stop the automatic offline process if an error is encountered when pulling transactions from a workstation. The default setting is **Yes**. If this parameter is set to **Yes**, the process continues even if an error is encountered, such as the workstation is offline or the .TRN path is invalid, and the job cannot pick up the .TRN files.
- **Offline (Automated): Directory where offline TRN files are stored** - This System-level parameter is used to specify the directory where the offline TRN files are gathered and stored on the **client** workstation. The default setting is: **C:\ProgramData\Polaris\5.0\OfflineTransaction**.

**Note:**

If your library chooses to use a network share, enter the path in this parameter. For example, **\\server\share**.

- **Offline (Automated): Enable automatic offline uploading** - This System-level parameter is used to enable automatic offline processing for the library system. The default value is **No**. If this parameter is set to



**Yes**, the Automated Offline job is enabled for all branches. For more information on this job, see [Enable and schedule the Automated Offline SQL job](#).

- **Offline (Automated): Generate one upload log per branch** - This System-level parameter is used for generating one or multiple log reports. If the value is set to **Yes** (the default), one upload log is generated per offline branch. If this parameter is set to **No**, a single log file is generated for all offline branches. Log files are saved to:  
**\\SERVER\c\$\ProgramData\Polaris\<version>\Logs\Offline**
- **Offline (Automated): Polaris user for automatic upload process** - This System-level parameter specifies the user assigned during the automatic upload processing. The default setting is **PolarisSuperUser**. To specify a user, choose the user from the drop-down list of usernames. If this user has the permission, **Patron registration: Modify postal address fields**, she can enter a valid postal code that does not already exist, and it is added to the Postal Codes database table.
- **Offline (Automated): Send offline upload log report to email address** - This parameter specifies the email addresses of users who receive the log reports. The parameter can be set at the System, Library, or Branch level. No email address is specified by default. (If the job runs and no email address has been entered at the Branch, Library, or System level, the logs will still be produced, but they will not be emailed.) You can enter one or multiple email addresses, not to exceed 255 characters total. If multiple email addresses are entered, they must be separated by semicolons.

### Enable and schedule the Automated Offline SQL job

When the Automated Offline job runs, it pulls the .TRN files from the offline folder location defined in the system-level parameter **Offline (Automated): Directory where offline TRN files are stored**.

To enable and schedule the Automated Offline SQL job:

#### Note:

You can also run this job manually.

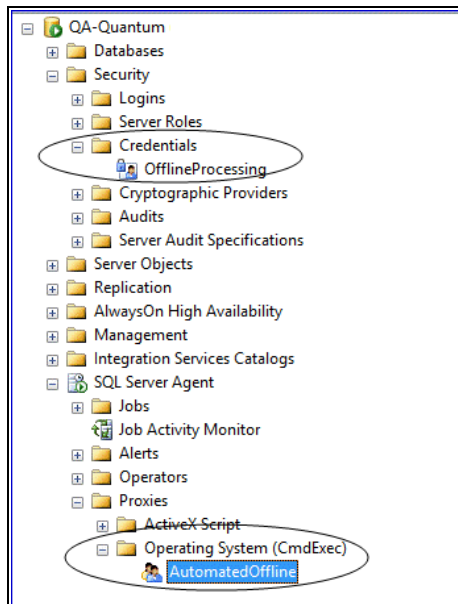
1. Create the server credential and proxy that allow the **Automated Offline** SQL job to access the designated offline workstations and pull the transaction files from

them:

**Note:**

You can use any name for the credential and proxy.

- a. Create the credential - The credential account must be a domain account that has access to the domain workstations from which the job will pull the offline circulation transactions (.TRN files).
- b. Create the proxy that associates the credential with the job under **Operating System (CmdExec)**.



2. Ensure that the System-level **Offline (Automated): Enable automatic offline uploading** parameter is set to **Yes**. See also: [Set up Offline \(Automated\) Parameters](#).
3. Schedule the **Automated Offline** SQL job. No default schedule is specified. You can also run the job manually.

When the job runs, it finds the .TRN files that are stored on the workstations in the directory specified in the parameter **Offline (Automated): Directory where offline TRN files are stored**. It then pulls these files from the workstations to the server, uploads the transactions into the Polaris database, renames the .TRN files with a .DON extension, and logs the results of the upload.

**Note:**

If no .TRN files are found, the SQL job history includes the message:  
**There were no TRN files copied.**

**Automated offline log processing**

If your library has set up automated offline processing, a System-level Patron Services parameter **Offline (Automated): Generate one upload log per branch** specifies whether one or multiple upload logs are generated. If the parameter is set to **Yes**, (the default), a log file is generated for each offline branch. If the parameter is set to **No**, a single log file is generated for all offline branches. Log files are saved to:

**\\SERVER\c\$\ProgramData\Polaris\<version>\Logs\Offline**

Another parameter **Offline (Automated):Send offline upload log report to email address**, which can be set at the System, Library, or Branch level, specifies the email addresses of users who receive the log reports.

**Note:**

For more information on the Offline (Automated) parameters, see [Set up Offline \(Automated\) Parameters](#).

The log files contain the following information:

- If a single log is generated at the System level for all offline branches, it has a section for each branch with the branch name and branch totals displayed at the top of each section.
- If the log is generated at the branch level, only one branch name is displayed with totals for that branch displayed at the top of the log.
- The log files have a .log extension and are named with the system or branch abbreviation and a date/time stamp.
  - Example of a System-level log file name: **QA Quantum YYYYMMDDHHMMSS.log**
  - Example of a Branch-level log file name: **STI YYYYMMDDHHMMSS.log**

---

## Setting Up Offline Circulation for Manual Uploading

If your library is not using automated offline processing, the offline transaction files (.TRN) files must be copied manually from the offline workstations and uploaded to the appropriate directory. You can upload transaction files to any directory, anywhere on the network share. But you must first create the appropriate **Polaris\[version]\offline** folder in that directory, before you upload the files. Administrators can specify the filepath for offline transaction files on the workstation during staff client installation.

When staff members are done using offline Polaris, the transaction files from each offline client must be copied to the online staff client workstation, located by default at:

**Local Drive:\ProgramData\Polaris\[version]\OfflineTransaction**

**or**

**Local Drive:\ProgramData\Polaris\[version]\datalink\OfflineTransaction)**

When you upload the files, a report (log file) is created. The file extension changes from **.TRN** to **.LOG**. For example, the file name **PTF 2017 06 01 0913 \_workstation** name.**LOG** consists of the following elements:

- PTF is an abbreviation for Polaris Transaction File
- 2017 is the year the file was created
- 06 is the month
- 01 is the day
- 0913 is the time (using the 24 hour clock)
- workstation name is the machine name of the offline client
- LOG is the extension

Under certain conditions, warning messages appear in the upload report. This generally occurs when an item was checked in or checked out offline, but the circulation status is not In or Out when uploaded to online Polaris. The item that circulated offline would have caused a block or alert if it had circulated online; for example, a patron exceeds the overdue item limit at check-out, or an item that fills a hold request is checked out. The warning messages in the upload report alert the staff that some follow-up action or an automatic update by Polaris may be necessary. See [Upload Report Warning Messages](#).

## Holds Processing at Upload

When an offline file with check-in transactions is uploaded, eligible items are trapped for holds by default. This may be a problem for some libraries, where staff might overlook the upload report indicating that an item has been trapped, and reshelve the item instead of holding it. In this case, set the Patron Services parameter **Offline: Trap holds at check-in** to **No** to suppress any holds processing when offline check-in transactions are uploaded. The default setting is **Yes**, which allows holds processing at upload. The parameter is available at the system, library, and branch levels.

See also:

- [Working Offline](#)
- [View and upload offline transaction files](#)

## View and upload offline transaction files

### Note:

This procedure differs for Polaris Hosted customers. Polaris Hosted customers can find specific instructions on the Polaris Hosted Utilities page or the Innovative Customer Supportal (<https://support.iii.com>).

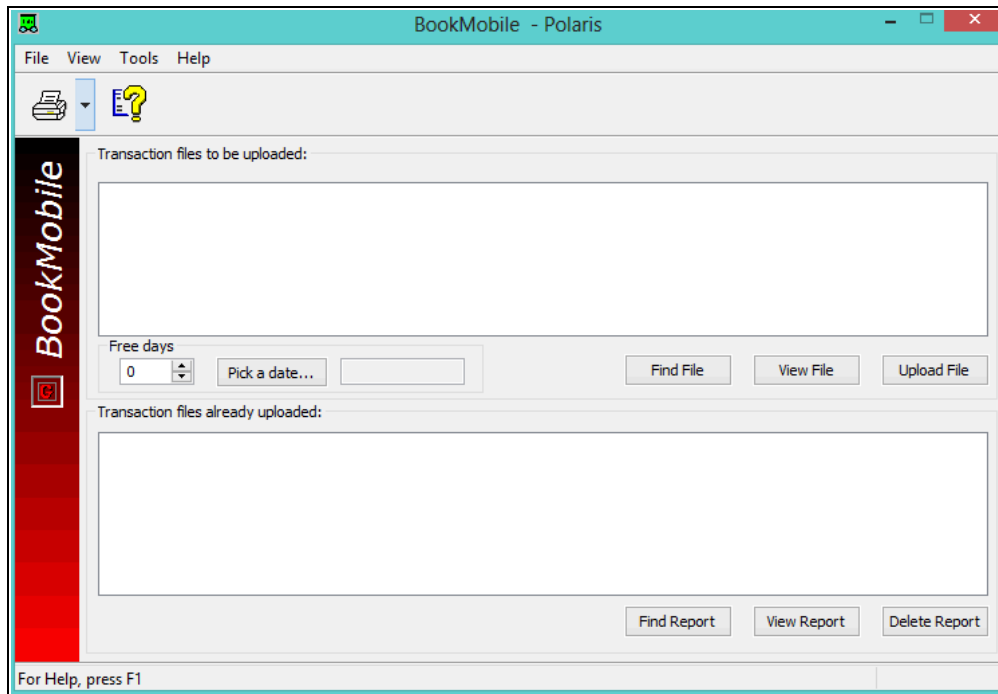
To view and upload offline transaction files to your online client:



**Tip:**

Click this button on the Shortcut Bar to display the Bookmobile workflow.

1. Using your online staff client, select **Circulation, Bookmobile** from the Polaris Shortcut Bar. The Bookmobile workflow appears. The list displays the transaction files available on the local drive.



In a terminal server environment, specify which transaction files you want to display in the **Transaction files to be uploaded** list:

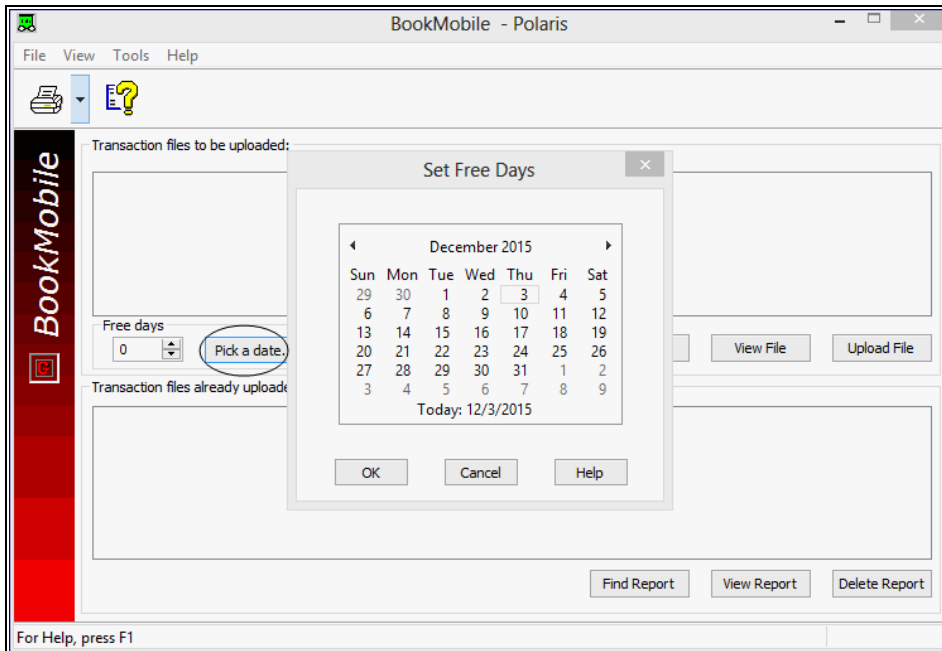
1. Select **Tools, Options**. The Bookmobile: Tools Options dialog box appears. Then select a **Display files** option:
  - **Created by logged on user** - Files created by the user currently logged on
  - **Created by workstations at this branch** - Files created by workstations at the branch
  - **All offline transaction/log files** - All files on the computer. In non-terminal server environments this option is selected and cannot be changed.

**Note:**

If the transaction files were created in a non-terminal server environment, but you are working in a terminal server environment, you can click **Find File** (or press **ALT+N**) and navigate to the local machine's files. Select the files (up to 50 at a time) to list them.

2. To view files before uploading them, follow these steps:
  - a. Select the transaction files in the **Transaction files to be uploaded** list. You can select up to 50 files at a time.

- b. Click **View File**. The View Transaction file dialog box displays the files.
- c. When you are finished viewing the files, click **Close** on the dialog box.
3. Specify the number of days to omit from overdue fine calculation, if any, in the **Free days** box or click **Pick a date** and select a date from the calendar. See [Free Days](#).



When you select a date from the calendar, the system automatically calculates the number of free days. The date box reflects the number of free days selected.

The specified number of days will be omitted from fine calculation when check-in transactions are uploaded. If you do not enter a value, the system uses the value set by the Patron Services parameter **Free days (bulk)** in Polaris Administration parameters. See [Free Days](#).

4. To set error handling during upload, follow these steps:
  - a. Click **Upload File**. The Error Stop Option dialog box appears.
  - b. Choose one of the following options, and click **OK**.
    - Click **stop on errors** if you want the file upload process to stop for any file in which Polaris finds an error. When errors are found, a message indicates why the file is not being uploaded.

- Click **continue and get error report in the end** if you want Polaris to complete the file upload process and then compile an error report.
5. Click **Upload File** to upload the selected files. The files are transferred to the **Transaction files already uploaded** list with a .log extension.
  6. To view the report, select the file in the **Transaction files already uploaded** list, and click **View Report**.

If the log files were created in a non-terminal server environment, but you are working in a terminal server environment, you can click **Find Report** (or press **ALT+O**) and navigate to the local machine's files. Select the files to display them in the **Transaction files already uploaded** list.

**Important:**

Always review the report for errors after uploading offline files. See [Upload Report Warning Messages](#).

To delete a transaction report, on the Bookmobile workform, select the log file in the **Transaction files already uploaded** list, and click **Delete report**.

## Upload Report Warning Messages

A report of warning messages is created automatically when you upload offline transaction files to the online Polaris client. The report may contain any of the following messages related to the offline transactions.

### Warning Messages for Barcodes, Blocks, Closed Day/Date

The following situations generate warning messages in the upload report:

Barcodes (invalid, unexpected, assigned)

At circulation, these situations generate messages:

- An item with an invalid barcode type is circulated.
- An item is checked out, but the patron barcode is an invalid type.
- An item is checked out, but the patron barcode is an item barcode type.
- An item with a patron barcode type is circulated.

At patron record creation, these situations generate messages:

- A barcode format is for an item instead of a patron.
- A barcode format is unrecognized.



- A barcode is already assigned.

## Item blocks

An item is checked in with a free-text, library-assigned, or system block.

1st level fine limit (by patron code and branch)

A patron exceeds the 1st level fine limit at check-out/renewal.

2nd level fine limit (by patron code and branch)

A patron exceeds the 2nd level fine limit at check-out/renewal.

Item limit by material type (by patron code and branch)

A patron exceeds the number of items of a specific material type that can be checked out.

Total item limit (by patron code and branch)

A patron exceeds the total number of items that can be checked out.

Overdue item limit (by patron code and branch)

A patron exceeds the overdue item limit at check-out.

A patron exceeds the overdue item limit at renewal. An overdue fine is charged.

Overdue item limit (by patron code and branch) with long overdues

A patron exceeds the overdue item limit at check-out and has long overdue items.

A patron exceeds the overdue item limit at renewal and has long overdue items. An overdue fine is charged.

Long overdues

A patron has long overdue items at check-out/renewal.

Renewal limit

A patron checks out an item, and the item exceeds its renewal limit.

Closed day/date

An item's original due date is changed to the next open date because the original date falls on a day closed (**Hours of operation** parameter) or a date closed (**Dates Closed** policy table).

## Warning Messages for Item Statuses

The following item statuses generate warning messages in the upload report:

### Bindery, Damaged, In-Repair

The item status was Bindery (or Damaged or In-repair) before the item was circulated.

### Claim

The item status was Claimed missing or Claimed never had before the item was circulated.

### Held

An item with a held status is checked out, and Polaris compares the borrower's barcode to the requestor's barcode. If the barcodes are identical, the request status is filled and the request is deleted. If the barcodes are not identical, the request status remains active. The request is reactivated for the requestor's barcode. If an item that *might* fill a hold request is checked in, the item status and the request status become held.

**Note:**

You can suppress holds processing for checked-in items at upload.

### In-Process

The item status was in-process before the item was circulated.

### In-Transit

The item status was in-transit before the item was checked out.

An item is bound to a hold request, and the item status was in-transit before the item was checked out.

The item status was in-transit before the item was checked in. Polaris checks for the destination library and any bound hold request:

- If there is no hold request and the assigned branch is not the check-in branch, send the item to the assigned branch.
- If there is no hold request and the assigned branch is the check-in branch, nothing needs to be done.
- If the item is bound to a hold request and the pickup branch is not the check-in branch, send the item to the pickup branch.

### Lost

The item status was lost before the item was circulated. Delete the replacement cost for the last borrower.

### Transferred

The item status was transferred before the item was circulated. The item retains its transferred status, with a hold request status of shipped. Send the item to the pickup library.

## **Messages Related to Reserve Items (Course Reserves)**

### Library Use Only

A reserve item was checked out offline. The reserve status is On Reserve, and Library Use Only is checked; that is, the reserve item is intended to be used only within the library. The message includes the item barcode and title.

### Total number of items exceeded

A reserve item was checked out offline. The reserve status is On Reserve and the Total Number of Reserve Items in the Patron/Material Type Loan Limits table has been exceeded. The message includes the patron name and patron barcode.

### Reserve item checked in

A message is written if a reserved item was checked in. The message includes the item barcode and title.

### Item linked to more than one course

When a reserve item is checked out offline, and the item is linked to more than one course, the system logs the check-out to the first course listed for the item and writes a message to the log file. The message includes the item barcode, title, and the course name, number, and section of the course credited with the circulation.

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## Working Offline

The process for working offline in Polaris is the same whether your library has opted to use the automated offline uploading process or the manual uploading process. For more information on these options, see [Managing Offline Circulation](#).

**Note:**

Polaris Hosted customers should not connect to Polaris Terminal Server to work offline.

To work offline in Polaris:

1. When you log on to Polaris, select the **Work off-line** checkbox on the Polaris Log On dialog box.

**Note:**

Your workstation may be set to automatically log you on when you open Polaris, and the Log On dialog box is not displayed. In this case, select File > Log Off > then File, Log On to display the Log On dialog box. For more information about setting Polaris for automatic log-on, see the Polaris Administration PDF Guide, Automatic Staff Client Log-On.

Once you have logged on, you are ready to work offline. Polaris creates a new transaction file for the session and automatically generates a file name.

2. Do any of the following tasks using offline Polaris:
  - Register patrons - See the Patron\_Services PDF Guide, Create a patron record topic.

**Note:**

Patron records created offline receive a Verify Patron block. For more information about removing the block, see the Patron Services PDF Guide, Resolve a Verify Patron block.

- Check out items and print check-out receipts - See the Patron Services PDF Guide, Check out an item.

**Note:**

In offline circulation, the due date calculation is based on the Standard Loan Period of the workstation's branch, not the user's branch. However, the Loaning Branch recorded in the transaction and in the item record is the logged-on user's branch. This allows libraries to gather statistics for different bookmobile stops based on user log-on, while maintaining a consistent loan period for the bookmobile (the workstation branch).

- Check in items - See the Patron Services PDF Guide, Do a normal check-in from the Check In workform and Check in items in bulk topics.

If your library does not use automated offline processing, you must upload the offline transaction files manually. See [View and upload offline transaction files](#).

## Media Dispenser Circulation

The Polaris staff client, Leap, and Polaris ExpressCheck support circulation from media dispenser units. These units consist of a tower of dispensers, each holding up to 100 media discs (DVDs, CDs, Blu-Ray discs).

To queue the media in the dispenser, a staff member or patron scans the item barcode on the empty case. When the system finds a matching barcode in the unit, and there are no blocks preventing the item's circulation, the patron scans her barcode into the media dispenser unit to retrieve the item.

Polaris supports one media dispenser unit (one network address) per location (branch organization). At each branch, multiple staff client, Leap, and Polaris ExpressCheck workstations can connect to the location's unit.

The Polaris integration that enables circulation via a media dispenser is available by separate license. Polaris ExpressCheck workstations and the Polaris ExpressCheck application are also available to your library by separate contract. For information about setting up the workstations and setting the Polaris Administration parameters that control Polaris ExpressCheck functions, see the Polaris ExpressCheck Administration Guide.

**Note:**

The media dispenser can be used with or without RFID.

With the few exceptions noted below, circulation processes from the Polaris staff client, Polaris Leap, or Polaris ExpressCheck do not differ from normal procedures.

### Polaris Staff Client and Leap

Patron authentication and checking for patron and item circulation blocks occur as in normal check-out processing, before the system checks for dispenser items. Then, when an item is scanned and a material type is detected that has been identified for dispenser processing by the check-out workstation's branch, Polaris queries the dispenser unit specified in the Network location setting for the workstation's branch. If a matching item barcode is found in the dispenser unit, the item check-out continues. If you have opted to display a message to staff, a message is displayed for each dispenser item checked out.

Bulk check-out, which is used when processing items for Outreach Services and Borrow by Mail, also supports dispenser circulation. If a dispenser item is encountered during bulk check-out, a message is displayed and the item is checked out.

### **Staff Client and Leap Receipts**

At the end of the patron's check-out process, the printed receipt includes the text defined for the workstation's branch in Polaris Administration. The text is printed after any library custom text. If you have chosen to include the dispenser location, this information is included for each item checked out, indicating the dispenser and slot number for the item.

### **Offline Processing**

The dispenser unit can be queried in offline mode and the check-out can continue.

### **Check-In**

Establish the appropriate procedures with library staff for loading checked-in items into the dispenser and reshelving the empty cases. Other than this workflow, no special conditions or exceptions apply to dispenser items when they are checked in.

### **Holds**

The check for hold requests happens before the check for dispenser material type. The item may become Held before being assigned to the dispenser. Staff can re-assign the item after it becomes Held, depending on policy.

### **Floating items**

The check for floating happens before the check for dispenser material type. If the item can float in, the system then checks the dispenser material type. Dispenser items may float to another branch. If no dispenser controls have been defined at the receiving branch, there is no change and the item circulates normally. If dispenser controls have been defined at the receiving branch, the item behaves according to that branch's dispenser settings.

Lost, missing, and other status transitions to In - If the check-in message has been enabled and the material type matches a material type defined for the dispenser unit, the check-in message is displayed as usual.

### **Polaris ExpressCheck**

As in the staff client, patron authentication and checking for patron and item circulation blocks occur as in normal check-out processing, before the system checks for

DiscXpress items. Then, when an item is scanned and a material type is detected that has been identified for DiscXpress processing by the check-out workstation's branch, Polaris queries the dispenser unit specified in the Network location setting for the workstation's branch. If a matching item barcode is found in the dispenser unit, a message is displayed on the check-out screen. At the end of the check-out session, the dispenser acknowledgment message is displayed. The patron must acknowledge the message to continue. If the message is not acknowledged, the process times out as in any other check-out.

### ExpressCheck Receipts

If the patron opts to print a receipt or if the receipt prints when the patron selects Exit, the system uses the receipt text specified for the workstation branch. If the option to print individual receipts for each item has been enabled for the ExpressCheck unit, the message prints at the end of each item in the dispenser unit. If you have chosen to include the dispenser location this information is included for each item checked out, indicating the dispenser and slot number for the item.

**Note:**

If the patron opts to not print a receipt or to receive a receipt by e-mail, no additional dispenser receipt is printed.

See also:

- [Enable media dispenser processing](#)
- [Media Dispenser - Errors and Troubleshooting](#)

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## Enable media dispenser processing

**Note:**

If the workstation on which Leap is running does not have the Polaris staff client installed, you must set the Workstation parameter, **Media dispenser: Use local security manager** to **Yes**.

To set up media dispenser processing in Polaris Administration for the Polaris staff client, Leap, and ExpressCheck:

**Note:**

The media dispenser parameter can be set at the System, Library, or



Branch organization level in Polaris Administration. To enable the media unit, you must obtain and enter the full network address or URL of the dispenser unit. Your network administrator determines the network address when the device is installed on your network.

1. In the Administration Explorer tree view, click the organization to expand the tree view.
2. Click **Parameters** to display the details view for the organization's parameters.
3. Click the **SelfCheck Unit** tab in the details view to display the self check unit parameters.
4. Double-click the SelfCheck Unit parameter **Media dispenser settings**.

The Media Dispenser Settings setup dialog box opens with the **General** tab displayed.

Media Dispenser Settings [ Community Library (br) ]

Enabled

Media dispenser vendor

ITG DiscXpress Properties

General Staff Client

Material types

Book

New / Popular Book

Video

Children's Video

Audiobook

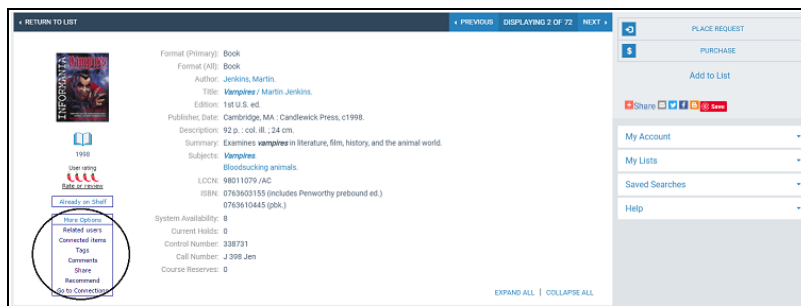
Music

Periodical

Include dispenser unit locations on printed receipt

OK Cancel Help

5. Select **Enabled**.
6. Click the **Properties** button to open the Properties dialog box.
7. On the Properties dialog box, type the full network address or URL of the dispenser unit (100-character limit) in the **Network location** box, and click **OK** to close the dialog box.
8. On the **General** tab, check the [material types](#) that can be dispensed by the unit. Select at least one item material type.
9. (Optional) Check **Include dispenser unit location on printed receipt**. This option applies to staff client, Leap, and ExpressCheck receipts. Check-out receipts must be enabled for the staff client and Leap workforms, and for ExpressCheck to include this information on a printed receipt.
10. Click the **Staff Client** tab.



11. Type the text to appear on the receipt in the **Receipt text** box (250-character limit).
12. (Optional) To issue a message when checking out from a media unit, check the **Enable check-out warning** box, and type the warning text in the box. The default warning message text is **Please retrieve items from the dispensing unit**. You can customize the message in the text box (250-character limit). If this warning message is enabled, it is displayed for each dispenser item during checkout. The staff member clicks **OK** to acknowledge the message and continue.
13. Click **OK** on the Media Dispenser Settings dialog box to save the settings.

**Note:**

If you are using Leap from a workstation that does not have the Polaris staff client installed, the workstation must be set up to use the local security manager for the media dispenser.

## Display Media Dispenser Acknowledgment Message in Polaris ExpressCheck

To display an on-screen dispenser acknowledgment message in Polaris ExpressCheck:

1. Open the SelfCheck Unit parameter **Polaris ExpressCheck: Enable**.
2. Select **Dispenser acknowledgment message**.
3. Click **OK** on the Polaris ExpressCheck Enable dialog box.
4. The default message is **Checkout Completed Successfully! Please retrieve item from the dispensing unit**. You can edit the message using Polaris Language Editor (WebAdmin); the string ID is **EC\_TEXT\_CHECKOUT\_COMPLETE\_DISPENSER**

A similar message is printed on the ExpressCheck check-out receipt. The default message is **Please retrieve items from the dispensing unit**. As appropriate items are checked out at the ExpressCheck workstation, the screen also displays the reminder message **Please remove items from the dispensing unit**. These messages are also available for editing using Polaris Language Editor. The strings IDs are **EC\_TEXT\_CHECKOUT\_RCPT\_DISPENSER**  
**EC\_TEXT\_DISPENSER\_REMINDER**

If the system fails to communicate with the dispenser unit during checkout, the ExpressCheck workstation displays an on-screen message, also available for editing. The default text is **The dispensing unit is not responding. The item cannot be checked out. Please contact a librarian**. The string ID in Polaris Language Editor is **EC\_TEXT\_CHECKOUT\_ERROR\_DISPENSER\_COMM**

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## Media Dispenser - Errors and Troubleshooting

You may occasionally encounter the following conditions and error messages:

- The system finds no matching item in the dispenser unit - The check-out process continues. The item is checked out anyway, because it is assumed that the item is in the case.
- No response from the dispenser unit - An item is scanned for check-out but the dispenser unit does not respond. In Polaris ExpressCheck, the item check-out fails and a message is displayed (see [Enable the media dispenser](#)). In the staff client, the following message is displayed: **The dispensing unit is not responding. The item may be retrieved manually. Do you want to check this item out?** The staff

member must select **Yes** or **No**. **Yes** continues the check-out transaction; **No** stops the transaction.

- An item will fill a hold request or is already held - There is no change to current program behavior, which depends on library policy. These checks take place before the system queries the dispenser unit.
- Items in the dispenser may have a status of Held - For example, the empty case may have been on the hold shelf or self-pickup shelf. The Held item is be checked out to the patron according to normal check-out processing. The patron goes through a normal dispenser check-out to retrieve the disc.
- The item is already out to this patron - Since the item has not gone to In, and so is not in the dispenser, the transaction is a simple renewal.
- Patron claims not to have an item checked out from the dispenser - Treat this claim as you would any other claim in Polaris. Staff may have to check the dispenser.
- Polaris shows that an item is already out to another patron - If library policy allows the patron to continue check-out and the item is in the dispensing unit, the item is removed from the last patron's record and checked out to the current patron. If the item is not in the dispensing unit, the item is now checked out to the current patron in Polaris but in fact is either still out to the previous patron or is missing. The library should follow its usual practice for trouble-shooting missing items, and if the item is found it should be checked in from the patron record.
- The dispensing unit has "locked" the item for another patron - At ExpressCheck, this might happen if a patron scans an item case and the check-out is successful, but the patron leaves the case at the workstation and does not retrieve the item. Another patron scans the case, but the dispenser has queued the item for the first patron. The ExpressCheck workstation then displays a message: **The dispensing unit is holding this item for another library member. The item cannot be checked out. Please contact a librarian.** You can edit the message in Polaris Language Editor (string ID `EC_TEXT_CHECKOUT_ERROR_DISPENSER_BIND`).
- Multi-part sets - The recommended practice is to have a separate item record for each part. If one item barcode is attached to a multi-part set, ExpressCheck has no provision to define or display an alert message for multi-part sets. In the staff client, if the item record contains a blocking note to check for multiple parts, the note is displayed as usual.
- Post check-out error conditions - These situations may occur after Polaris processing is complete:

- Check out is successful but the patron does not claim disc - The transaction is complete in Polaris. The dispenser unit has a time out. Trouble-shooting for the dispenser unit is possible by examining the dispenser queue.
- Check out is successful but the wrong item is dispensed - This might happen if an item is incorrectly loaded. The patron must contact library staff, who must examine the dispenser unit.
- Check out is successful, but no item is dispensed - This might happen if the item material type is not correctly entered or identified. The patron must contact library staff, who must examine the dispenser queue.
- Check out is successful, but the DVD case already contains another item - This might happen if the correct item was not loaded into the dispenser unit. The patron should return the item to library staff.

## Setting Up Borrow by Mail Circulation

With Polaris Borrow by Mail options, staff members and patrons can request library materials and have the requested materials delivered by mail. Libraries can restrict Borrow by Mail options by patron code, establish a fee for the service, and allow exceptions to the fee for some patrons, such as homebound patrons.

**Note:**

Polaris Borrow by Mail is available by license. There is no additional cost, but Borrow by Mail features are available only if the license is activated.

Within a library system or consortium, one or more branches can be designated as Borrow by Mail processing centers in Polaris Administration. Processing centers may be actual branches or virtual organizations set up for this specific purpose. When a Borrow by Mail request is placed, the pickup location defaults to a designated processing center, and the item is routed to this location by normal holds routing procedures. You can designate multiple processing centers. Or a branch may handle both normal and Borrow by Mail requests by establishing itself as a processing location. In this case, an optional message alerts staff to a Borrow by Mail request when the item is trapped at circulation.

At the processing center, Borrow by Mail items are placed in packets (one item per package), with an accompanying letter, mailing label, and return address label. They are checked out to the patron and then shipped. A tracking number can then be entered into the request workflow. After check-out and until the item is returned, the request status is Out.

To set up Borrow by Mail, you first designate processing centers at the system level. Other Borrow by Mail settings are available at the library, system, or branch level. See [Define Borrow by Mail parameters](#).

For more information about using Borrow by Mail functions in the staff client, see [Borrow By Mail Circulation](#).

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## Define Borrow by Mail parameters

To set up Borrow by Mail, you first designate processing centers at the system level. Other Borrow by Mail settings are available at the library, system, or branch level.

To set up Borrow by Mail circulation in Polaris Administration:

1. In the Administration Explorer tree view, open the **Parameters** folder for the system, and click the **Request** tab in the details view.
2. Double-click **Borrow by mail**. The Borrow by Mail dialog box - Processing Centers tabbed page appears. (This page appears only when the dialog box is opened at the system level.)
3. Select all the organizations that might serve as processing centers for the branches that will enable **Borrow by Mail**.

To enable Borrow by Mail features for any individual organization, at least one organization must be designated as a processing center on this tabbed page.

- If you have one central processing center for the whole system, designate only one processing center.
- If various processing centers will serve various branches, or if branches will serve as their own processing centers, select all the possible processing centers.

**Note:**

Processing centers may be actual branches or virtual organizations set up for this specific purpose. For more information about creating new organizations, see [Setting Statistical Codes for Reports](#).

4. If you will set up all Borrow by Mail options at the system level (that is, all organizations will participate in Borrow by Mail and use the same settings), go directly to the next step. Otherwise, click **OK** to close the dialog box at this point, and re-open it for each organization that will use Borrow by Mail circulation.
5. On the Options tabbed page, select **Enable Borrow by Mail** and select a processing center for this organization.

**Note:**

Telephone notices include Borrow by Mail messages if Borrow by Mail is enabled at the system level. If you use both telephone notification and

Borrow by Mail, enable Borrow by Mail at the system level, then disable it for any branch that is not using Borrow by Mail.

The available options depend on your settings on the system-level Processing Centers tabbed page.

**Note:**

An item that fills a Borrow by Mail request created in the staff client is shipped to the processing center designated for the log-in branch of the workstation that created the hold request. An item that fills a Borrow by Mail request from the PAC is shipped to the processing center designated for the patron's registered branch.

**Important:**

Be sure the processing center is listed in the holds routing sequence table for the branch that originated the hold request. See [Setting Up Holds Routing](#).

6. (Optional) Select **Display confirmation message in PAC** to display a special confirmation message when the patron places a Borrow by Mail request.

**Tip:**

You can display the patron's contact information on the PAC request confirmation page so that the patron can quickly verify the address to which the Borrow by Mail item will be shipped. See [Set Holds options: Alerts and blocks](#).

**Note:**

If the processing center charges a delivery fee (see step 11), this confirmation message states the charge and offers the option to continue or cancel the request.

7. (Optional) Select **Staff display note** and edit the text of the note if you wish (maximum 250 characters). If individual branches process their own Borrow by Mail items along with regular circulations, you should check this option to alert staff members to Borrow by Mail items. This note is automatically added to the Hold Request workform - Notes view when the request is saved. It then appears when an item that fills the Borrow by Mail request is trapped at circulation, and alerts the staff member that the item requires Borrow by Mail processing. The system uses



the processing center's setting.

8. (Optional) Select **PAC display note** and edit the text of the note if you wish (maximum 250 characters). This note is automatically added to the Hold Request workform - Notes view when the request is saved. The note is displayed to patrons in the information view for individual items listed on the PAC patron account Requests page. The system uses the processing center's setting.

**Note:**

Staff members with the branch-level Circulation permission **Hold requests: Modify PAC display note** can edit the note for individual hold requests on the Hold Request workform - Notes view.

9. Select **Suppress charge for Outreach Services patrons** if you ordinarily charge a delivery fee for Borrow by Mail requests, but you do not want to charge a fee to homebound (Outreach Services) patrons.
10. If you want to change the loan period to accommodate shipping time, select the number of days to extend the calculated loan period for an item. This setting is available only if the organization is designated as a processing center. The system uses the processing center's setting at bulk checkout. Search Polaris help for "Bulk-Processing Borrow by Mail Items."
11. Click the **Limits** tab to set Borrow by Mail limits:
  - Check the patron codes for the patrons permitted to place Borrow by Mail requests. The system uses the settings for the patron's registered branch in both the staff client and PAC.
  - (Settings available for the system or library level only, or for the processing center defined for a branch organization.) If you want to charge a Borrow by Mail delivery fee, select the appropriate patron code, set the charge amount, and click **Apply**. You can set separate charges for different patron codes. To specify the same charge for multiple patron codes, select the codes, then set the charge amount and click **Apply**. The system uses the processing center's settings for charges. A processing center should set charges for all the patron codes it intends to charge, regardless of whether those codes are used for the processing center's own patrons.

**Note:**

Requests placed from the PAC use the settings of the processing center for the patron's registered branch, while requests placed from the staff client use the settings of the processing center for the workstation's

branch. It is therefore possible that the fee may differ depending on where the request is placed.

- Clear the item material types that should not be eligible to fill Borrow by Mail requests. For PAC requests, the system uses the setting for the patron's registered library. For staff client requests, the system uses the setting for the workstation branch. Be sure to uncheck any item material types used for eContent such as ebooks.

**Note:**

You can prevent a specific item from filling a Borrow by Mail request by checking **Do not mail** on the Item Record workform - Cataloging view.

12. Click the **Print & Notices** tab and make the following settings:

- Specify a return address for the item mailer. You can select **Processing Branch** (default) or **Item's Branch** (item's assigned branch).
- Select **Enable failure notice** to send an automatic notice to the patron when an item cannot be checked out during Borrow by Mail bulk checkout due to blocks on the patron account.
- If you checked **Enable failure notice**, select a notification method.

The available method options are determined by your settings for notification methods on the **Notification options** parameter - General tabbed page. For more information about these settings, see [Delivering Notices by Phone \(Outbound Telephony\)](#).

**Note:**

Telephone notices include Borrow by Mail messages if Borrow by Mail is enabled at the system level. If you use both telephone notification and Borrow by Mail, enable Borrow by Mail at the system level, then disable it for any branch that is not using Borrow by Mail.

13. Click **OK**.

Related Information

- Borrow by Mail workflows - See [Borrow By Mail Circulation](#).
- Request status of Out - When a held item is checked out, the request status changes to Out until the item is returned. The request is then deleted. The status is automatically enabled for organizations using Borrow by Mail and is displayed in

the staff client and the PAC patron account (where it appears as **Sent**). Organizations that do not use Borrow by Mail can choose to display or suppress the display of requests with the status of Out. On the Holds options dialog box - Staff & PAC tabbed page (**Request** parameters), select the option **Display request status "Out"**. The setting for the workstation's logon branch controls the display in the staff client, while the setting for the patron's registered branch controls the display in the PAC patron account.

- Modify Borrow by Mail item mailer or failure notice text - You can edit and translate the default text with Polaris Language Editor. See the Polaris Language Editor Guide or Language Editor online Help. Foreign language text for the mailer must include the fee as text because the system does not automatically insert the amount in the foreign language translation.
- Placing Borrow by Mail requests in PAC - See the PowerPAC online help.

## Setting Up Outreach Services

Polaris Outreach Services are available by specific contract with Innovative Interfaces. These functions automate title selection and delivery to homebound and other designated patrons, and allow individual patron profiles based on reading preferences, delivery mode, and other characteristics. You can have Polaris generate selection lists for individual patrons, or manage outreach services for multiple patrons, based on the next scheduled delivery date or delivery route. An outreach services “patron” does not have to be an individual; you can set up a patron record for an institution and designate the institution as an outreach services patron. For more information about outreach services workflows, see [Outreach Services Processing](#).

To set loan periods and fine policies for outreach services patrons, you can set up a patron code or codes to use specifically for these patrons, then set the appropriate loan periods and fine codes for the outreach patron codes. See also:

- [Defining Patron Codes](#)
- [Defining Loan Period Durations](#)
- [Setting Fine Amounts](#)

Outreach services policy tables control what options are available for fields in the Patron Status workform - Reader Services view and the Outreach Services Manager, and what items are eligible for selection list processing. You can work with the outreach services tables at the system, library, or branch levels.

**Note:**

These System Administration permissions are required to work with outreach services policy tables: **Access administration: Allow, Access tables: Allow, Modify outreach services tables: Allow.**

See also:

- [Setting Delivery Options](#)
- [Setting Outreach Patrons Options](#)
- [Setting Outreach Items Options](#)
- [Setting Up Reader Ratings](#)

---

## Setting Outreach Delivery Options

You set up delivery methods, routes, and stops in Polaris Administration to make these available as selections for outreach services patrons.

- Delivery methods (modes) - Each method you specify will appear as a selectable option in the Patron Delivery Options dialog box (Patron Status workform - Reader Services view), and as an option for filtering the patron list in the Outreach Services Manager when outreach services processing is done for multiple patrons. See [Set outreach delivery mode options](#).
- Delivery routes and stops along the routes - Each route you specify will appear as a selectable option in the Patron Delivery Options dialog box (Patron Status workform - Reader Services view), and as an option for filtering the patron list in the Outreach Services Manager when outreach services processing is done for multiple patrons. See [Set up outreach delivery routes](#).

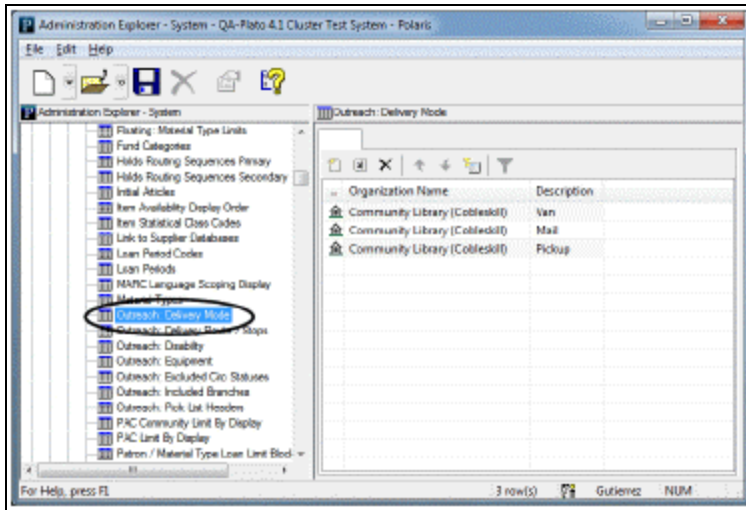
### Set outreach delivery mode options

To set the possible methods by which your organization delivers items to outreach services patrons:

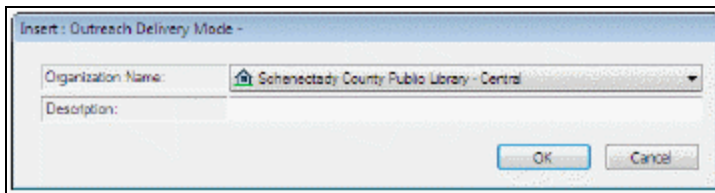
**Note:**

Your organization may allow a designated person to pick up items on behalf of the outreach services patron. If so, include a “pickup” delivery mode so that this option is available in the appropriate patron status records.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Delivery Mode**. The Outreach Delivery Mode table is displayed in the details view.



- Click  to display the Insert Outreach Delivery Mode dialog box.





- Select the branch in the **Organization Name** box.

**Note:**

If the Outreach Delivery Mode policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

- Type the delivery method in the **Description** box.
- Click **OK**. The Outreach Delivery Mode table is displayed with the new entry. The status bar indicates that the modification is pending.
- Select **File > Save** to save your changes. The status bar indicates that the record is saved.

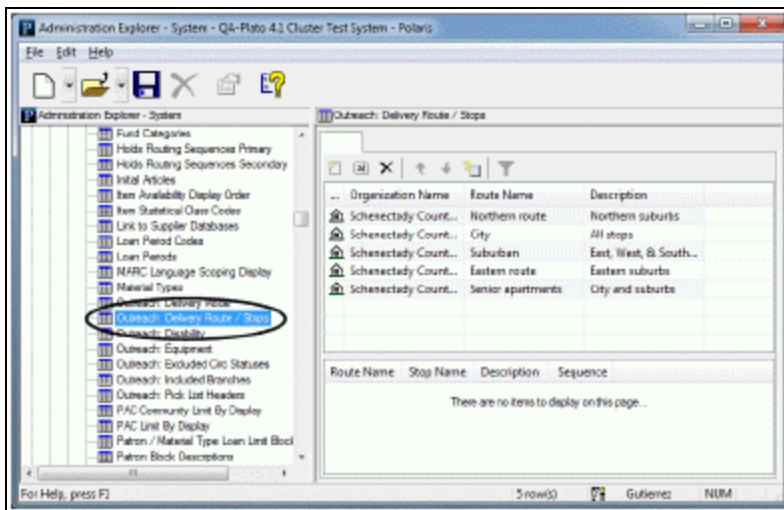
**Related Information**

- Modify a table entry - Select the entry and click .
- Delete a table entry - You can delete an entry only if it is not being used in a current patron record. Select the entry and click .


## Set up outreach delivery routes

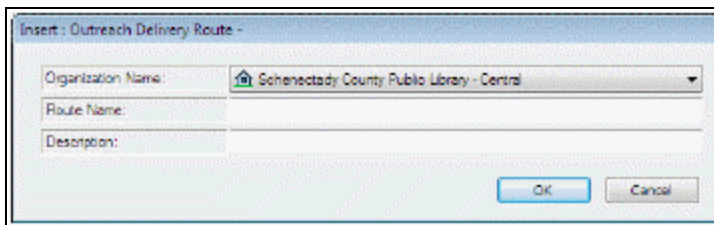
If you deliver items to outreach services patrons, you can set up delivery routes and specify stops along the routes. To set up outreach delivery routes:

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Delivery Route/Stops**. The Outreach Delivery Route/Stops table is displayed in the details view.



2. To add a delivery route, follow these steps:

- a. Click  with no existing route selected. The Insert Delivery Route dialog box appears.




- b. Select the branch in the **Organization Name** box.

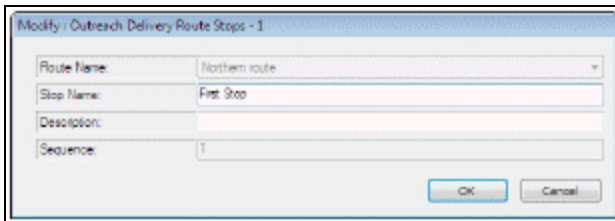
### Note:


If the Outreach Delivery Route policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

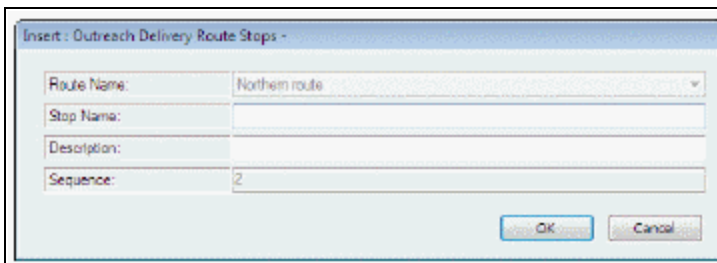
- c. Type a name for the route in the **Route Name** box.
  - d. Type a brief note or description of the route in the **Description** box.
  - e. Click **OK**. The Outreach Delivery Route table is displayed with the new entry in the upper part of the table.
  - f. Select **File > Save**.
3. To add stops to a delivery route, follow these steps:

**Note:**  
 Each stop you specify will appear as a selectable option for the route in the Patron Delivery Options dialog box (Patron Status workform - Reader Services view).



- a. In the upper part of the table, select the route you want to modify. In the lower part of the table, one stop is listed for the route by default.
- b. To modify the name and description of the default stop, select the stop in the lower part of the table and click . The Modify Delivery Route Stops dialog box appears.






- c. Type the name and description (optional) for the first stop, and click **OK**.
- d. To add new stops to the route, select any line in the lower part of the table, and click . The Insert Delivery Route Stops dialog box appears.





- e. Type the name and description (optional) for the new stop, and click **OK**.
  - f. Type a brief note or description of the stop in the **Description** box.
  - g. Click **OK**. The Outreach Delivery Route table is displayed with the new entry in the bottom part of the table. The status bar indicates that the modification is pending.
  - h. Continue to add stops to the route by repeating steps d-g.
4. To adjust the order of stops on a route, follow these steps:
    - a. Select the route in the upper part of the table. The stops for the route are listed in the lower part of the table.
    - b. Select a stop and click  or  to move the stop earlier or later in the stop sequence.
  5. Select **File > Save** to save your changes.

**Related Information**

- Modify a table entry - To modify a route, select an entry in the top portion of the table and click . To modify a stop along a route, select the route, then select the stop in the bottom portion of the table and click .
- Delete a table entry - You can delete an entry only if it is not being used in a current patron record. Select the entry and click .

---

## Setting Outreach Patrons Options

You can set up the following patron options specifically for outreach services patrons:

- Disability descriptions - Each disability description you specify will appear as a selectable option in the Patron Preferences dialog box (Patron Status workform - Reader Services view). See [Set outreach patron disability selections](#).
- Equipment needs - Each equipment description you specify will appear as a selectable option in the Patron Preferences dialog box (Patron Status workform - Reader Services view). See [Set outreach patron equipment selections](#).

**Note:**

Disability and equipment needs descriptions are informational only, and do not affect what titles are selected for the patron or how they are delivered.

In addition, reading histories are automatically enabled for outreach services patrons because the system uses reading histories in processing selection lists for outreach services patrons. You can set limits on the length of time the history covers and the number of items it can contain that are separate from reading history limits for non-outreach services patrons. See [Set reading history limits for outreach patrons](#).

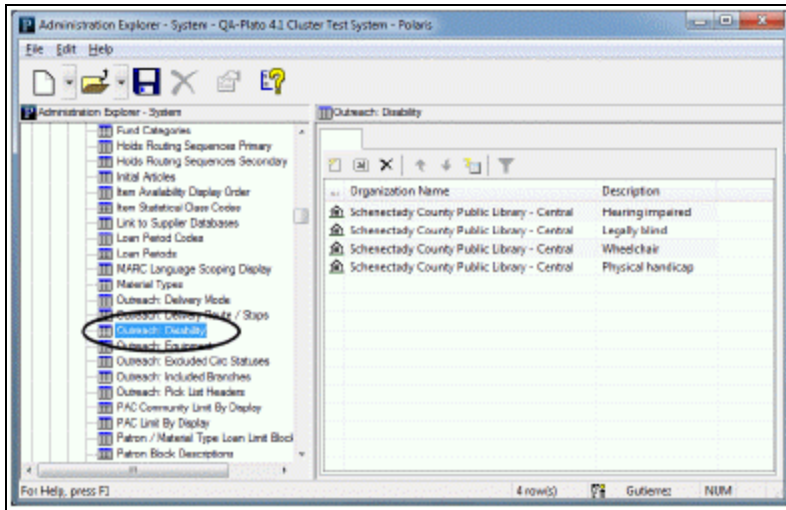
### Set outreach patron disability selections

To set the options staff can select to note an outreach patron's disability in the patron's record:

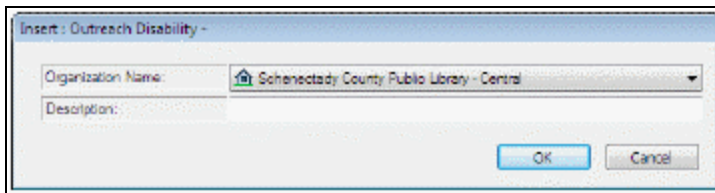
**Note:**

This table is optional and can be left empty. If you do not set up the table, no disability-related options are available for selection in the patron record.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Disability**. The Outreach Disability table is displayed in the details view.



- Click  to display the Insert Outreach Disability dialog box.





- Select the branch in the **Organization Name** box.

**Note:**

If the Outreach Disability policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

- Type the disability selection in the **Description** box.
- Click **OK**. The Outreach Disability table is displayed with the new entry. The status bar indicates that the modification is pending.
- Select **File > Save** to save your changes. The status bar indicates that the record is saved.

**Related Information**

- Modify a table entry - Select the entry and click .
- Delete a table entry - You can delete an entry only if it is not being used in a current patron record. Select the entry and click .

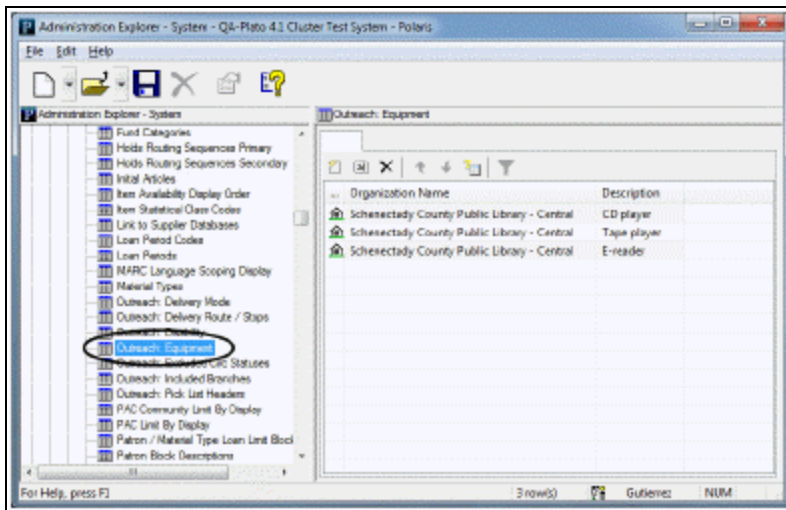
### Set outreach patron equipment selections


To set the options staff can select to specify a special equipment need for an outreach patron.

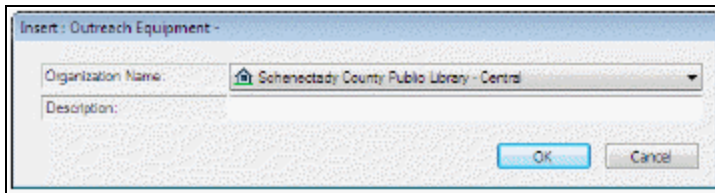
**Note:**

This table is optional and can be left empty. If you do not set up the table, no equipment options are available for selection in the patron record.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Equipment**. The Outreach Equipment table is displayed in the details view.



2. Click  to display the Insert Outreach Equipment dialog box.





3. Select the branch in the **Organization Name** box.

**Note:**

If the Outreach Equipment policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type the equipment selection in the **Description** box.
5. Click **OK**. The Outreach Equipment table is displayed with the new entry. The status bar indicates that the modification is pending.
6. Select **File > Save** to save your changes.

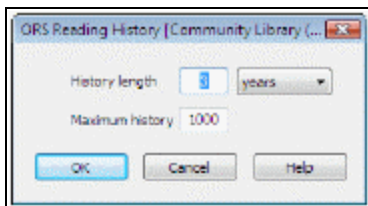
#### **Related Information**

- Modify a table entry - Select the entry and click .
- Delete a table entry - You can delete an entry only if it is not being used in a current patron record. Select the entry and click .

#### **Set reading history limits for outreach patrons**

To set limits on reading histories for outreach services patrons:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **ORS Reading history**. The ORS Reading History dialog box appears.



3. Specify the length of time (from check-out date to current date) to retain an entry in the Reading History list by doing these steps:
  - a. Type the number of months or years in the first **History length** box.
  - b. Select the unit of time (months or years) in the second **History length** box.
4. In the **Maximum history** box, type the maximum number of entries that can be retained at one time in the Reading History list.

#### **Note:**

An entry's creation date in the reading history is usually, but not always, the check-out date. For example, offline uploads may cause some variation. Also, Polaris does not consider the exact time of check-out. If the **Maximum history value** is exceeded, and several items were checked

out on the same date, Polaris deletes the items from the reading history in an unspecified order.

5. Click **OK** on the Reading History Setup dialog box.

**Related Information**

- Reading history limits for non-outreach services patrons - See [Setting Reading History Options](#).
- Allow staff members to remove items from reading histories - Staff members with the Circulation permission **Remove non-ORS patron histories: Allow** can remove individual items from the reading histories of non-outreach services patrons. Staff members with the Circulation permission **Remove ORS patron histories: Allow** can remove individual items from the reading histories of outreach services patrons. See the Patron Services PDF Guide, Working with Reading Histories for details.
- Reader ratings - Staff members can enter title ratings on behalf of an outreach services patron in the patron's reading history. See [Setting Up Reader Ratings](#).
- Links from bibliographic record - Staff members with the Circulation permission **ORS: Link from bibliographic record: Allow** can select **Links, Outreach Patrons** in the Bibliographic Record workflow to display a list of Outreach Services patrons who have items linked to the bibliographic record in their reading histories. See the Patron Services PDF Guide, Link from a bibliographic record to outreach services patrons.

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## Setting Outreach Items Options

These settings control what items are candidates for selection list processing for outreach services patrons and the information that appears in the pick lists that are built from selection lists.

- Excluded circulation statuses - You can exclude items with specific statuses from selection list processing. For example, if you exclude items with a status of Bindery, no item with this status ever appears in a selection list as a “candidate” for the outreach patron’s pick list. See [Set circulation statuses for outreach selection lists](#).
- Branch items to include - You can opt to include other branches’ items in selection list processing, and specify which branches to include. Or you can opt to restrict the candidate items to those belonging to the user’s workstation branch. See [Set branch items to include in outreach selection lists](#).
- Pick List column heads - You can tailor the Outreach Services Pick List view to include the item data most useful for your organization’s workflow. See [Set pick list column heads](#).
- Prompt to update next service date at normal check-out - You can display a prompt during normal check-out to update an active Outreach Services patron’s next service date if an item not on the patron’s pick list is checked out to the patron. See [Prompt - update next service date at normal check out](#).

### Set circulation statuses for outreach selection lists

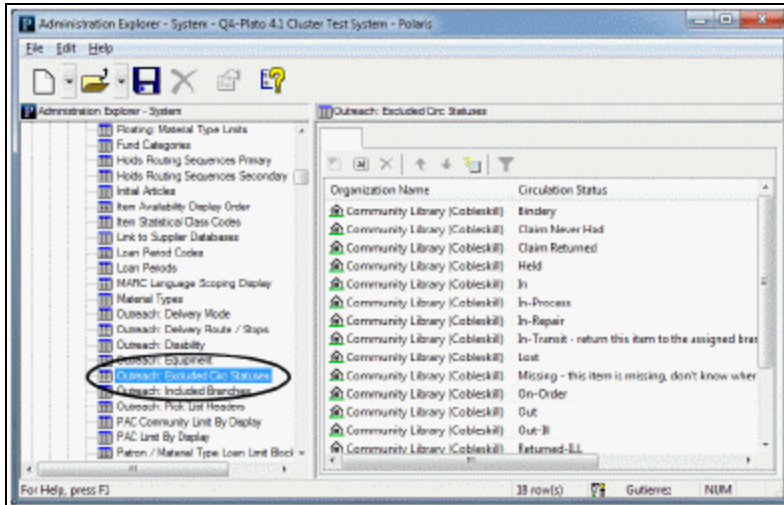
To set the item circulation statuses that should be excluded from outreach selection list processing:

**Note:**


By default, items with the following circulation statuses are excluded from selection list processing: Bindery, Claim Missing, Claim Never Had, Held, In-Repair, In-Transit, Lost, Missing, Transferred, Unavailable, Withdrawn.

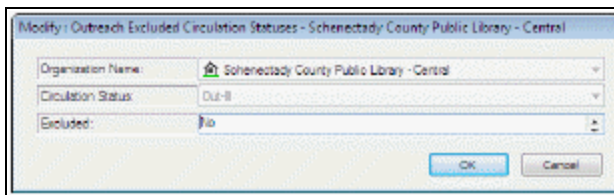
1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Excluded Circ Statuses**. The Outreach

Excluded Circ Statuses table is displayed in the details view.



For each organization, you can indicate whether a circulation status should be excluded from outreach selection lists (**Yes** in the Excluded column), or included in outreach selection lists (**No** in the Excluded column). You cannot add or delete entire circulation status entries.

2. To change the setting for a status, select the line entry and click , or double-click the entry. The Modify Outreach Excluded Item Statuses dialog box appears.



3. Select **Yes** or **No** in the Excluded box, and click **OK**. The Outreach Excluded Circ Statuses table is displayed with the new setting. The status bar indicates that the modification is pending.
4. Select **File > Save** to save your changes. The status bar indicates that the record is saved.

### Set branch items to include in outreach selection lists

The Outreach: Included Branches table works with the Patron Services parameter **ORS: Include other library items in selection list processing**. When the parameter is set to



**Yes**, staff members can choose **Default branches** in the Selection List workflow to include items belonging to all the libraries in the Included Branches table in selection list processing, or select any one of these branches from the drop-down list. However, if the parameter is set to **Yes** but no branches have been set in the Included Branches table, the **Default branches** option includes only the user's workstation branch. When the parameter is set to **No**, the Outreach: Included Branches table is ignored and only items belonging to the user's workstation branch are selection list candidates.

To set the branch items that should be included in outreach selection list processing:

**Note:**

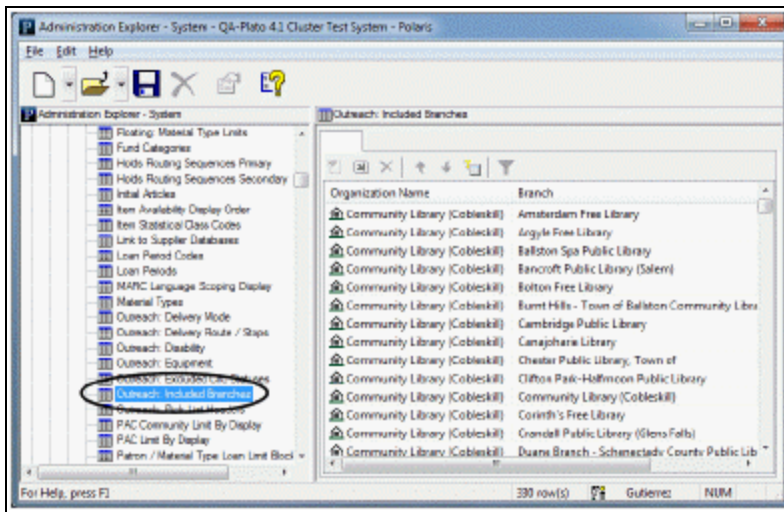
Included Branches processing can be manually overridden when building selection lists. When you use the Find Tool to search for a title to add to the selection list, the Find Tool searches all branches, not just included branches. When a title is manually added by this method, all items attached to the bibliographic record are returned as candidates to add to the pick list (not just those assigned to included branches). See the Patron Services PDF Guide, Placing Items on Reserve.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **ORS: Include other library items in selection list processing**, and set the parameter to **Yes**.
3. Select **File > Save** to save this change.
4. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Included Branches**.


**Note:**

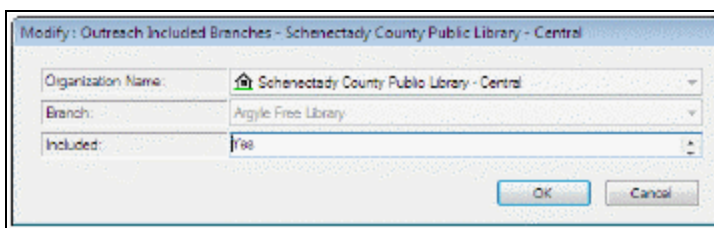
To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Outreach Included Branches table is displayed in the details view.



For each organization, you can indicate whether items from a particular branch should be included in outreach selection lists (**Yes** in the Included column), or not considered in outreach selection lists (**No** in the Included column). You cannot add or delete entire table entries.

- To change the Included setting for a branch, select the line entry and click , or double-click the entry. The Modify Outreach Included Branches dialog box appears.



- Select **Yes** or **No** in the **Included** box, and click **OK**. The Outreach Included Branches table is displayed with the new setting. The status bar indicates that the modification is pending.
- Select **File > Save** to save your changes. The status bar indicates that the record is saved.

**Related Information**

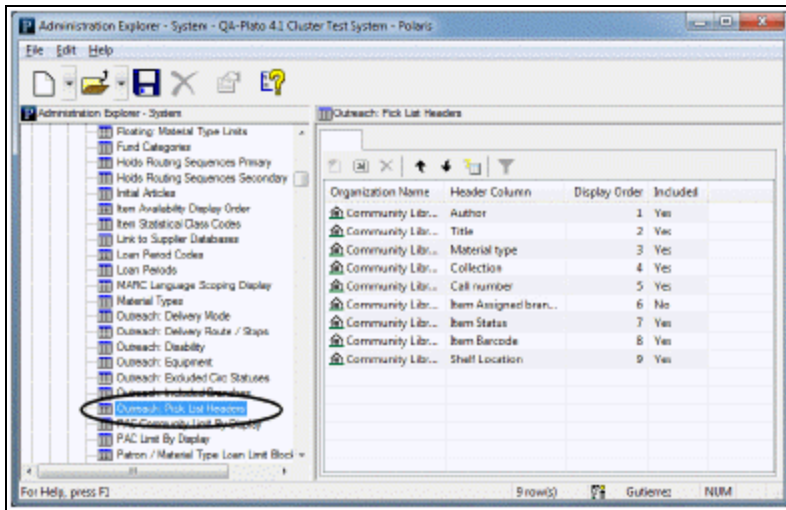
Results set size - The maximum result set size for the Outreach Services selection list is controlled by the PowerPAC profile **Results set: Maximum number of records to return**. The default setting is 100,000. When the results set is returned, your settings for status

and branch exclusions are applied, and the top 5,000 relevancy-ranked titles are returned.


### Set pick list column heads

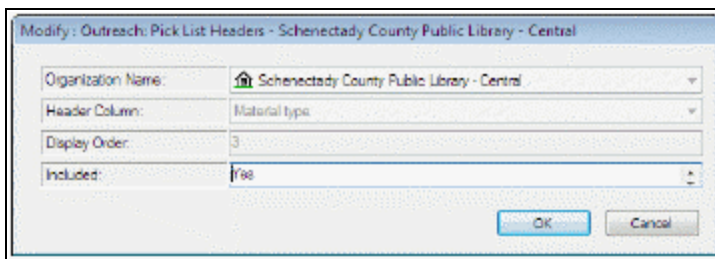
To set the column heads for outreach services pick lists, and the order in which they appear on the workflow:



1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Pick List Headers**. The Outreach Pick List Headers table is displayed in the details view.



You can indicate whether a column should be included in the pick list view of the workflow (**Yes** in the Included column), or not included (**No** in the Included column), and you can modify the column display order. However, you cannot add or delete entire table entries.

2. To change the Included setting for a column, select the line entry and click , or double-click the entry. The Modify Outreach Pick List Headers dialog box appears.



3. Select **Yes** or **No** in the **Included** box, and click **OK**. The Outreach Pick List Headers table is displayed with the new setting. The status bar indicates that the modification is pending.
4. To change the order of columns in the pick list view, select an entry and click  or  to move the stop to the left or right. The up arrow moves the column to the left. **1** indicates the first column on the left. The down arrow moves the column to the right.
5. Select **File > Save** to save your changes.

### **Prompt - update next service date at normal check out**

You can choose to display a prompt during normal check out to update an active Outreach Services patron's next service date if the item is not on the patron's pick list. If the staff member chooses to update the next service date from the prompt, the patron's Next Service Date and Last Service Date are updated based on the Outreach Services delivery schedule set for that patron. If no prompt is displayed, or if the staff member chooses not to update the service date, the patron's next service date is not affected. The parameter is available at the system, library, and branch levels. The system uses the setting of the staff member's log-on branch.

To set the prompt to display:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **ORS: Prompt for update during normal check-out**, and set the parameter to **Yes**.
3. Select **File > Save**.

#### **Related Information**

- Setting service schedules - See the Patron Services PDF Guide, Set the outreach patron's delivery options.
- Processing items from the patron pick lists - See the Patron Services PDF Guide, Placing Items on Reserve.

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## Setting Up Reader Ratings

Staff members with the Circulation permission **Modify ORS patron ratings: Allow** for the patron's registered branch can enter reader ratings submitted by Outreach Services patrons after the items have been returned. The staff member selects the item in the patron's Reading History list (Patron Status workform - Reader Services view) and enters the rating and related note, if any. Ratings already entered can also be modified. The Reading History list includes Rating and Note columns for outreach services patrons, where the rating number and any associated note are displayed. For more information about entering reader ratings, see the Patron Services PDF Guide, Working with Reader Ratings.

### Packing Lists

To gather the ratings, the staff member provides a printed packing list to the Outreach Services patron when the items are checked out to the patron. The list can be printed manually, or you can set the packing list to be printed automatically when the items are checked out from the patron's ORS Selection List or the Outreach Services Manager Pick List view. In this case, the list is printed in place of the check-out receipt. (A packing list can also be printed from the Patron Status workform - Items Out view for selected items that have already been checked out, if the patron is an Outreach Services patron.)

**Note:**

If items are checked out to an Outreach Services patron from the Check Out workform, the standard check-out receipt is printed.

The 8.5 x 11" packing list consists of the following elements:

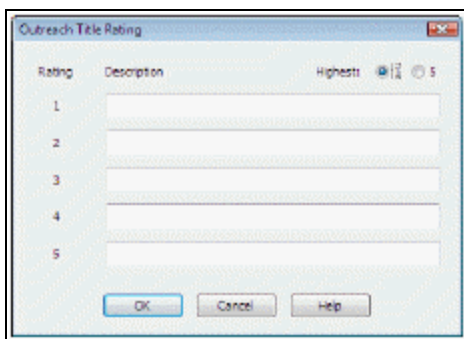
- Header - The library name and any text you define. See [Set up the packing list content and print method for reader ratings](#).
- Date and time
- Patron data - Patron's name, patron code, and last six digits of the patron barcode
- Item data - the complete call number, item material code, first 50 characters of the title, and the due date

- Rating - The text defined for the rating line. See [Set up the packing list content and print method for reader ratings](#).
- Total items

## Set up reader ratings

To enable reader ratings and set up the rating scale:

1. In the Administration Explorer tree view, open the **Parameters** folder for the system, and select the **Patron Services** tabbed page in the details view.
2. (System level only.) Double-click the Patron Services parameter **Outreach title rating**. The Outreach Title Rating dialog box opens, where you define the 1-5 rating scale.



3. Click the **Highest** value to indicate which end of the scale (1 or 5) is the most positive rating a title can receive.
4. Type a description (maximum of 50 characters) for each rating increment on the scale.
5. Click **OK**.
6. To enable reader ratings for individual organizations, open the **Parameters** folder for each organization and select the **Patron Services** tabbed page in the details view. If all organizations will use reader ratings, you can set the parameter at the system level.
7. Double-click the Patron Services parameter **Outreach title rating**.
8. Double-click **Outreach title rating enabled**, and set the parameter to **Yes**.

## Set up the packing list content and print method for reader ratings

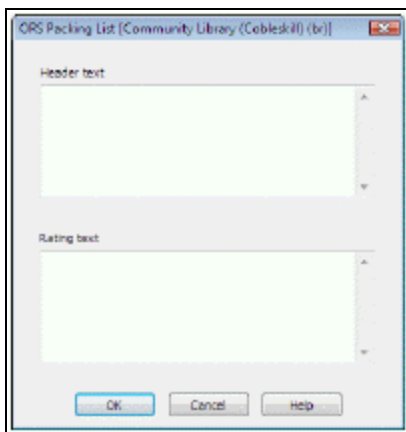
To set up packing list printing:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.

**Note:**

Packing list text can be set at the system, library, and branch levels. For consistent results, you may want to specify the text at the system level.

2. Double-click **ORS packing list**. The ORS Packing List dialog box opens.



3. Specify the header text and introductory rating text.

Each part can be 500 characters maximum; press **ENTER** to start a new line within the header or rating text. The header does not automatically include the library address and/or contact information in the header, so you may want to add this information. Other content is always included in the packing list; see [Packing Lists](#).

4. Click **OK**.
5. To set the packing list to print automatically at check-out, double-click the Patron Services parameter **ORS automatically print packing list**, and set the parameter to **Yes**.

If the parameter is set to **Yes**, the packing list is printed automatically when the items are checked out from the patron's ORS Selection List or the Outreach Services Manager Pick List view. In these cases, the list is printed in place of the check-out receipt. (A packing list can also be printed from the Patron Status workform - Items Out view for selected items that have already been checked out, if the patron is an Outreach Services patron.) If the parameter is set to **No**, a staff member must print the packing list.

6. Select **File > Save**.

## Setting Up Course Reserves

Your Polaris system may include course reserve functions to serve an academic community. With these features, you can place materials on reserve for use in a class during a semester or term. Reserve materials can be drawn from the regular collection, instructors may bring in personal material to be placed on reserve, or the materials may be temporary items such as photocopies. Course reserve records store information about the courses for which items are placed on reserve.

Polaris handles the reserved items through reserve item “records,” which are views of Polaris item records for materials placed on reserve. The reserve item record carries its own circulation parameters, which may be different from those in effect if an item is taken off reserve and returned to the circulating collection. Circulation statistics for reserve items are also kept separately. Staff and patrons can search for reserve materials from the staff client and the PAC.

In Polaris Administration, you set up course reserve data tables that supply the options for fields such as course name, school, department, and term dates in the course reserve record. Additional course reserve parameters enable course reserve functions, and control the default settings for reserve item records.

**Note:**

Polaris course reserve functions are available by specific contract. If your Polaris installation does not include Polaris course reserves, the features described in this unit are not available.

See also:

- [Setting Course Reserve Tables](#)
- [Setting Course Reserve Options](#)



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## Setting Course Reserve Tables

Course Reserve policy tables control what options are available for fields in the Course Reserve record as follows:

- **Course Reserves: Course names** - Associates the organizations (branches) with the course numbers, section numbers, course names, and course abbreviations for which the branches handle course reserves.
- **Course Reserves: Course terms** - Associates the organizations (branches) with the course terms, course start dates, and course end dates for which the branches handle course reserves.
- **Course Reserves: Departments** - Associates the organizations (branches) with the academic departments for which the branches handle course reserves.
- **Course Reserves: School/Divisions** - Associates the organizations (branches) with the academic schools or divisions for which the branches handle course reserves.

You can add, change, or delete items from the course reserves tables at the system, library, or branch levels.

**Note:**

These System Administration permissions are required to work with Course Reserve tables: **Access administration: Allow, Access tables: Allow, Modify Reserve Tables: Allow.**

### Add courses for course reserves

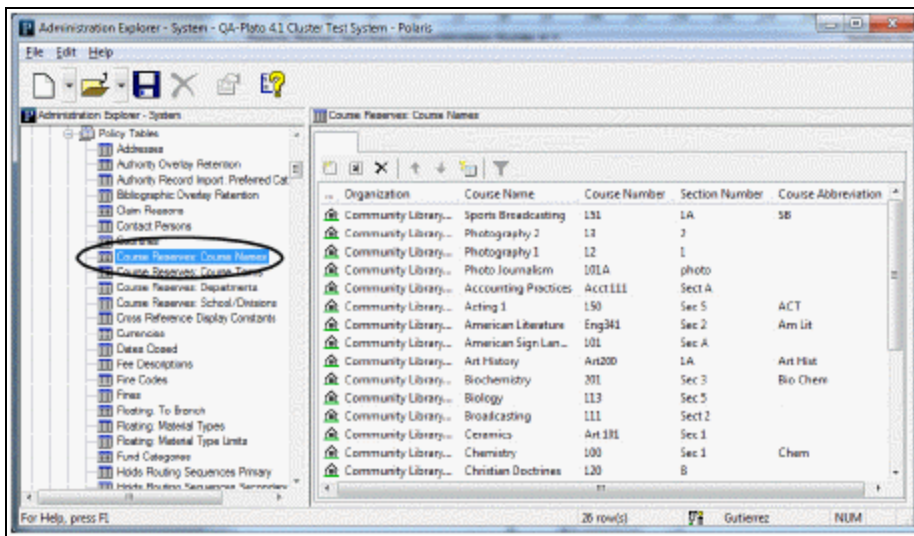
When you add courses, you associate each course entry with a branch organization, and specify more detailed identification information about each course. To add individual courses to the Course Names table:


**Tip:**

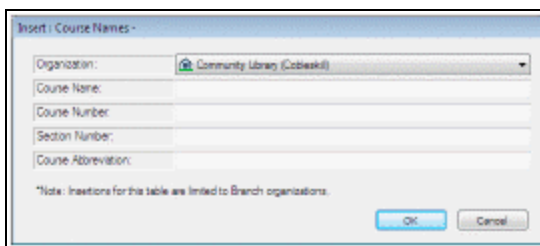
You can set up one or two “dummy” courses to accommodate special situations. For example, a library may put valuable or special items on permanent reserve behind the circulation desk. You might name the

“course” for these items **CircDesk**. Although they are not reserved for an actual course, you can use course reserve functionality to control their circulation.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Course Reserves: Course names**. The Course Names table is displayed in the details view.



2. Click  to display the Insert Course Names dialog box.



3. Select the branch in the **Organization Name** box.

**Note:**

If the Course Names policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

**Tip:**

Omit initial articles (A, An, The) from the course name. Unlike most

searches in Polaris, if the course name begins with an article (A, An, The), you must include the article or use a wildcard character in the Polaris Find Tool search term.

4. Type the appropriate values in the **Course Name**, **Course Number**, **Section Number**, and **Course Abbreviation** boxes.

The course number, section number, and course abbreviation are optional. Each value you specify will appear as a selectable option in the course reserve record workflow. See the following examples:

- If a course is always identified by a unique name and number combination, you can set up the table entry so that selecting the course name in the course reserve record workflow always provides the correct course number.

**Example:**

For a course listed as CIS631 Computer and Network Security, add one Course Name table entry with these values:

**Course Name: Computer and Network Security**

**Course Number: CIS631**

When the course reserve record is set up for this course, selecting the name provides the correct number in the course number field.

- If courses are listed with common names but unique numbers, you may want to add separate entries for each name/number combination.

**Example:**

Courses are listed as English 101, English 102, and English 103. Add three Course Name table entries with these values:

(Entry 1)

**Course Name: English**

**Course Number: 101**

(Entry 2)

**Course Name: English**

**Course Number: 102**

(Entry 3)

**Course Name: English**

**Course Number: 103**

When the course reserve records are set up for these courses, the staff

member selects the course name **English**, then selects the course number from the options **101**, **102**, or **103**.

- Alternatively, you can make the course number part of the name itself, and leave the number blank.

**Example:**

Courses are listed as English 101, English 102, and English 103. Add three Course Name table entries with these values:

(Entry 1)

**Course Name: English 101**

**Course Number:** (leave blank)

(Entry 2)

**Course Name: English 102**

**Course Number:** (leave blank)

(Entry 3)



**Course Name: English 103**

**Course Number:** (leave blank)

When the course reserve records are set up for these courses, the staff member selects the course name **English 101**, **English 102**, or **English 103**. There are no course numbers to select.

5. Click **OK**. The Courses table list is displayed with the new entry. The status bar indicates that the modification is pending.
6. Select **File > Save** to save your changes. The status bar indicates that the record is saved.

**Related Information**

- Modify a table entry - Select the entry and click .
- Delete a table entry - You can delete an entry only if it is not being used in a current course reserve record. Select the entry and click .
- Add table entries from a new course reserve record - Course names, course numbers, section numbers, and course abbreviations can also be added to the Course Names table from the Course Reserve workform in the staff client, by entering the information in the Add New Course Information dialog box. The information is added to the Course Names table for the branch that owns the course reserve

record, and to the Course Names table at the system level. For more information, see the Patron Services PDF Guide, Setting Up Course Reserve Records.

- Specify the default search field for PAC course reserve searches - See the Public Access Administration PDF Guide, Specifying Default Search Settings.

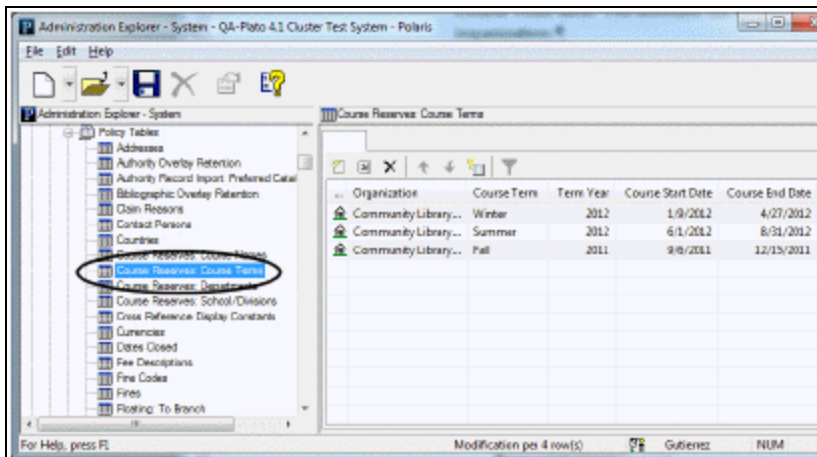
### Add course schedule information for course reserves

You associate the schedule entries with a branch organization. To add course terms and dates to the Course Reserves: Course Term table:

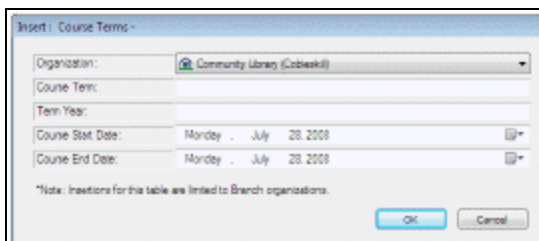
**Important:**

Add appropriate course terms, years, start dates, and end dates to this table at regular intervals (for example, annually).

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Course Reserves: Course terms**. The Course Terms table is displayed in the details view.



2. Click  to display the Insert Course Terms dialog box.



3. Select the branch in the **Organization Name** box.

**Note:**

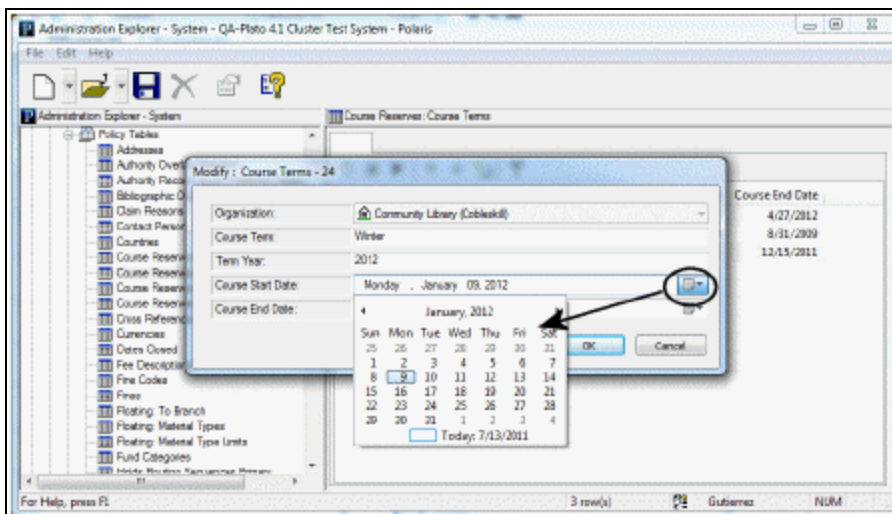
If the Course Terms policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type a term name (such as **Fall** or **Spring**) in the **Course Term** box.
5. Type a four-digit year (such as **2012**) in the **Term Year** box.

**Note:**

The **Course Term** and **Term Year** values together provide an option that a staff member can select when creating a course reserve record. For example, if you create an entry for **Fall 2012** in the Course Terms table, a staff member can choose this value to identify a course in a course reserve record.



6. Set the course start date:
  - a. Click the calendar icon on the **Course Start Date** box. The calendar appears.



- b. Click the month arrows until the month for the start date appears.
  - c. Click the date on which the course starts. The Start Date calendar closes.
7. Set the course end date (must be after the course start date):
  - a. Click the calendar icon on the **Course End Date** box. The calendar appears.
  - b. Click the month arrows until the month for the end date appears.

- c. Click the date on which the course ends. The End Date calendar closes.
8. Click **OK** in the dialog box. The Course Term table is displayed with the new entry. The status bar indicates that the modification is pending.
9. Select **File > Save** to save your changes. The status bar indicates that the record is saved.

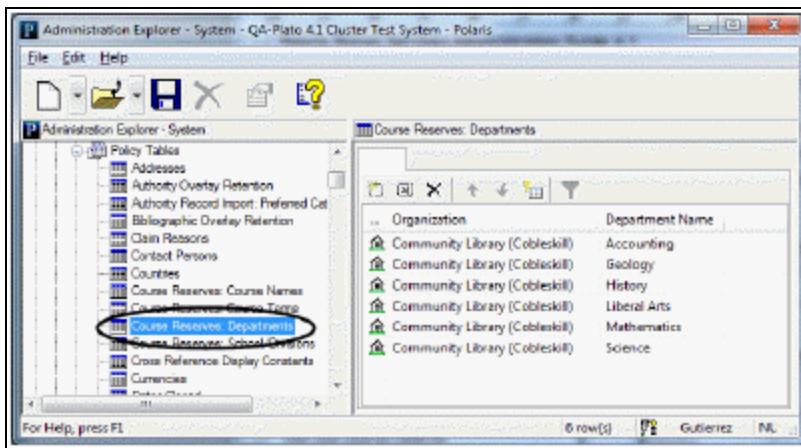
**Related Information**


- Modify a table entry - Select the entry and click .
- Delete a table entry - You can delete an entry only if it is not being used in a current course reserve record. Select the entry and click .

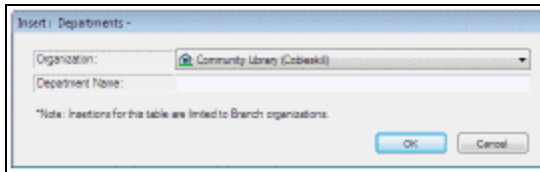
**Add departments for course reserves**

You associate each department entry with a branch organization. To add academic departments to the Course Reserves: Departments table:

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Course Reserves: Departments**. The Departments table is displayed in the details view.



2. Click  to display the Insert Departments dialog box.





3. Select the branch in the **Organization Name** box.

**Note:**

If the Course Departments policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type the name text in the **Department Name** box, and click **OK**. The **Department Name** list is displayed with the new entry. The status bar indicates that the modification is pending.
5. Select **File > Save** to save your changes. The status bar indicates that the record is saved.

**Related Information**

- Modify a table entry - Select the entry and click .
- Delete a table entry - You can delete an entry only if it is not being used in a current course reserve record. Select the entry and click .

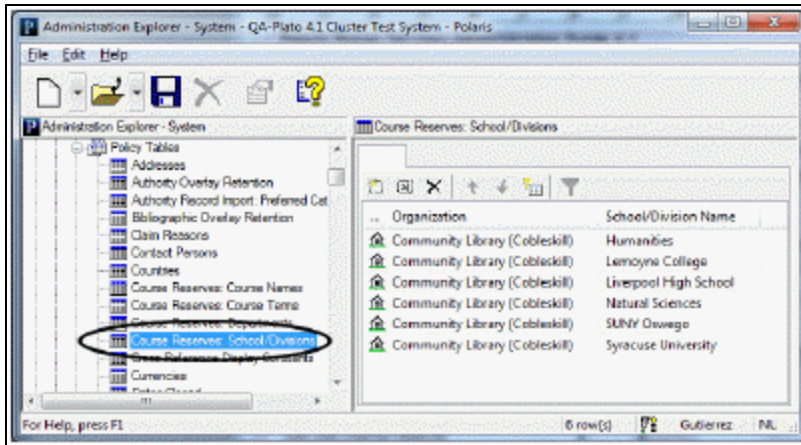
**Add schools/divisions for course reserves**


You associate each school or division entry with a branch organization.

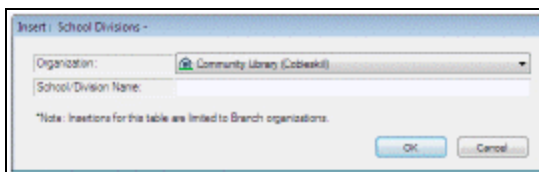
To add schools or divisions to the Course Reserves: School/Divisions table:

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Course Reserves: School/Divisions**. The School/Divisions table is displayed in the details view.





2. Click  to display the Insert School Divisions dialog box.





3. Select the branch in the **Organization Name** box.

**Note:**

If the School/Divisions policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type the name text in the **School/Division Name** box, and click **OK**. The **School/Divisions** table list is displayed with the new entry. The status bar indicates that the modification is pending.
5. Select **File > Save**.

Related Information

- Modify a table entry - Select the entry and click .
- Delete a table entry - You can delete an entry only if it is not being used in a current course reserve record. Select the entry and click .

---

## Setting Course Reserve Options

Course reserve options control the default settings for the reserve item “record,” which stores circulation, status, and disposition information about an item that has been placed on course reserve. The default values for the reserve item record can be different from those used in the equivalent (non-reserved) item record. For example, when an item is placed on reserve, the default loan period and fine code can be different from the values set for the same item when it is in the library’s circulating (non-reserve) collection.

You set reserve item defaults with the Patron Services parameter **Course reserve options**, which you can access from the Administration Explorer or an organization workflow. Course reserve options are available at the system, library, and branch levels.

See also: [Set default values for reserve items](#)

### Set default values for reserve items

To set the default values for reserve item records:

1. In the Administration Explorer tree view, open the Parameters folder for the organization.
2. Click the **Patron Services** tab in the details view.
3. Double-click **Course reserve options** to display the Course Reserve Options dialog box.

The screenshot shows the 'Course reserve options' dialog box. It contains the following fields and options:

- Reserve holding detail:**
  - Assigned branch: Community Library (Cobleskill) (COB)
  - Assigned collection: (None)
  - Shelf location: (None)
  - Loan period code: (None)
  - Fine code: (None)
  - Renewal limit: 0 (with up/down arrows) and a  Holdable checkbox.
- Copy owner:**
  - Instructor
  - Library
- Action when done:**
  - Discard
  - Return to collection
  - Return to owner
  - Auto-delete
- Copyright compliance:**
  - None
  - CC
  - CC0
- Bottom row of checkboxes:**
  - Library use only
  - Requires full cataloging
  - Purchase
  - Copyright fee required

Buttons: OK, Cancel, Help

4. Select the default assigned branch for reserve item records from the **Assigned branch** list.
5. To include default collection information in the reserve item record, select a collection in the **Assigned collection** list. The list includes all collections defined for the assigned branch.
6. To include default shelf location information in the reserve item record, select a location in the **Shelf location** list. The list includes all shelf locations defined for the assigned branch.
7. Select a default loan period in the **Loan period code** list.
8. Select a default fine code in the **Fine code** list.
9. Select a default renewal limit in the **Renewal limit** list. If you do not ordinarily allow renewals on reserve items, select **0**.
10. Select **Holdable** if hold requests are allowed on most reserve items.
11. Designate the default owner of reserve items:
  - Select **Library** if most reserve items are drawn from the library's collection.
  - Select **Instructor** if instructors supply most reserve items.
12. Select the default action to take when a reserve item is taken off reserve:
  - **Discard** - Indicates that the item should be discarded when it is taken off reserve. You may wish to use this option if most of your reserve items are photocopies or temporary materials provided by the instructor.
  - **Return item to collection** - Indicates that the item should return to the library's circulating (non-reserve) collection when it is taken off reserve. This option is available only if **Library** is the selected copy owner.
  - **Return to owner** - Indicates that an item should be returned to the instructor when it is taken off reserve. This option is available only if **Instructor** is the selected copy owner.
  - **Auto-delete** - Automatically deletes the item record (and the associated bibliographic record, if appropriate) when an item is taken off reserve. If most of your reserve items are instructor-owned, and you are therefore creating temporary item records for them when they are placed on reserve, you may wish to select this option. This option is available only if **Discard** or **Return to Owner** is selected.
13. If most of your reserve items are photocopies, select a copyright compliance option:

- **CCG** (compliance with copyright guidelines) - Use this option for photocopied journal articles if the article is dated within the last five years, and your library does not own the journal title, and this is the fifth or fewer request made for this item within the current calendar year.
- **CCL** (compliance with copyright law) - Use this option for all other photocopies; for example, if the article is older than five years, or your library owns the journal title, or this is the sixth or greater request within the calendar year and if your library is paying royalties to the Copyright Clearance Center or a document delivery vendor.

**Note:**

Select **None** if most reserve items are not photocopies.

14. Select **Library use only** if most reserve items should not be removed from the library.
15. Select **Requires full cataloging** if most reserve items need further cataloging. This option is available only if **Library** is the selected copy owner.
16. Select **Purchase** to indicate that the library may wish to purchase copies of most reserve items, if they are instructor-owned, or additional copies of library-owned items.

**Note:**

This option sets an indicator in the reserve item record. It does not initiate automatic purchase order functions.

17. Select **Copyright fee required** if a copyright fee is required for most reserve items.
18. Click **OK**.
19. Select **File > Save** to save any changes.

**Related Information**

- Reserve collections - Branches that deal with extensive course reserves may want to set up reserve collections. For more information about setting up collections, see [Setting Up eReceipts](#).
- Limit the number of reserve items a patron can check out - See [Defining Loan and Request Limit Blocks](#).
- Instructor information - Information about instructors in course reserve records derives from linked patron records for the instructors. For more information, search Polaris help for "Creating and Editing Patron Records."

## NCIP Administration

NCIP (NISO Circulation Interchange Protocol) is a standard suite of messages designed to allow disparate systems, such as the Polaris ILS and regional resource sharing solutions or ILL applications, to exchange data in support of lending and circulating material among members of the two systems. NCIP is also used for patron authentication alone by some third party applications.

To set up NCIP processing with Polaris, you use policy tables to map NCIP data to Polaris data and NCIP parameters to configure NCIP processing for your library.

See also:

- [Mapping NCIP Data to Polaris Data](#)
- [Setting NCIP Parameters](#)

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## Mapping NCIP Data to Polaris Data

Use the following policy tables to map NCIP data to Polaris data:

- [NCIP Medium Types: Outgoing and NCIP Medium Types: Incoming](#)
- [NCIP User Privilege Types](#)
- [NCIP Fiscal Action Types](#)
- [NCIP Payment Types](#)
- [SIP Payment Types](#)

### Map NCIP medium types to item material types

**Note:**

These System Administration permissions are required to modify the NCIP Medium Types policy tables: **Access administration: Allow; Access tables: Allow; Modify NCIP Medium Types: Outgoing - Allow; Modify NCIP Medium Types: Incoming - Allow.**

NCIP supports a limited number of medium types, as shown in the table below.

NCIP Medium Type ID	Description
1	Audio tape
2	Blu-Ray
3	Book
4	Book with Audio Tape
5	Book with Compact Disc
6	Book with Diskette

NCIP Medium Type ID	Description
7	Bound Journal
8	CD-Rom
9	Compact Disc (CD)
10	Diskette
11	DVD
12	Magazine
13	Microform
14	Video Tape

To map NCIP medium types to Polaris item material types for outgoing and incoming requests:

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the system, and select **NCIP Medium Types: Outgoing**. The **NCIP Medium Types: Outgoing** policy table is displayed in the details view.
2. To map a Polaris item material type to an NCIP medium type, double-click the material type. The Modify dialog box appears.
3. Select an NCIP Medium Type from the list and click **OK**.

You can assign none, one, or more than one item material type to each NCIP medium type, but an item material type can be assigned to only one NCIP medium type. The default NCIP medium type is Book. If you select **None** for the Medium Type, the item material type cannot be assigned to that medium type and will not be eligible for ILL requests.

4. Select **File > Save** to save your changes.
5. In the Policy Tables folder for the system, select **NCIP Medium Types: Incoming**. The **NCIP Medium Types: Incoming** policy table is displayed in the details view.

This table maps NCIP Medium types to Polaris item material types for incoming requests, and is used for requests where the Polaris library is the borrower. This table allows the library to create ILL items with different material types.

6. To map an NCIP medium type to a Polaris item material type, double-click the NCIP medium type. The Modify dialog box appears.
7. Select a Polaris item material type from the list and click **OK**.

The default item material type is ID 01 (typically Book, but your library may assign a different material type to ID 01 in the Material Types policy table; search Polaris help for "Defining Material Types." ).

8. Select **File > Save** to save your changes.

### Map NCIP user privileges to Polaris patron codes

To map NCIP user privilege types to Polaris patron codes:

**Note:**

Contact your Polaris Site Manager for advice on completing this table.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the system, and select **NCIP User Privilege Types**. The NCIP User Privilege types policy table is displayed in the details view.
2. To modify a mapping, select the Polaris patron code and click the Modify icon above the table. The Modify dialog box opens.
3. Select a public user privilege, an academic user privilege, both, or **None** (no mapping).

**Note:**

None means that those Polaris patron codes are not mapped to any NCIP user privilege type, and will not be authenticated for ILL requests.

4. Click **OK** on the dialog box. The NCIP User Privilege types table appears with the new mapping. The status bar indicates that the modification is pending.
5. Select **File > Save** to save your changes.

### Modify the NCIP fiscal action types mapping

The NCIP Fiscal Action Types policy table is pre-filled with NCIP fiscal action types that cannot be modified. You can select the patron account transaction to map to the NCIP



fiscal action type.

**Note:**

The permission **Modify NCIP Fiscal Action Types table: Allow** is required to modify this table.

To modify NCIP fiscal action type mapping:

1. In the Administration Explorer tree view, open the Policy Tables folder at the system level, and select **NCIP Fiscal Action Type**.

The following NCIP fiscal action types are listed with their corresponding Polaris patron account transactions:

- Assess
  - Cancel
  - Forgive
  - Payment
  - Penalty
  - Waive
  - Write Off
2. Double-click a fiscal action type. The **Modify: NCIP Fiscal Action Types** dialog box opens.
  3. Select a Polaris patron account transaction type from the drop-down list box.  
Only one Polaris patron account transaction type may be selected for each NCIP fiscal action type, but a Polaris payment method can be assigned to more than one NCIP fiscal action type. The payment type value can be blank.
  4. Click **OK**.

### Modify the NCIP payment types mapping

This table is pre-filled with NCIP payment types that cannot be modified. You can select the Polaris payment method to map to the NCIP payment type.

**Note:**

The permission **Modify NCIP Payment Types table: Allow** is required to modify this table.

To modify NCIP payment type mapping:

1. In the Administration Explorer tree view, open the Policy Tables folder at the system level, and select **NCIP Payment Types**.

The following NCIP payment types are listed with their corresponding Polaris patron account transactions:

- Bank Draft
  - Cash
  - Check
  - Credit Card
  - Debit Card
  - Deposit Account
  - Direct Debit
  - Funds Transfer
  - Money Order
  - Traveler's Check
2. Double-click a payment type. The Modify: NCIP Payment Types dialog box opens.
  3. Select a Polaris payment method from the drop-down list box.

Only one Polaris payment method may be selected for each NCIP Payment Type, but a Polaris payment method can be assigned to more than one NCIP Payment Type. The Polaris payment type value can be blank.

4. Click **OK**.

### Modify the SIP payment types mapping

This table is pre-filled with SIP payment types that cannot be modified. You can select the Polaris payment method to map to the SIP payment type.

**Note:**

The permission **Modify SIP Payment Types table: Allow** is required to modify this table.

To modify SIP payment type mapping:

1. In the Administration Explorer tree view, open the Policy Tables folder at the system level, and select **SIP Payment Types**.

The following SIP payment types are listed with their corresponding Polaris payment methods:

- AAM Allocation Account Payment Code
  - Blackboard Account Payment Code
  - Cash
  - Check
  - Coupons
  - Credit Account Payment Code
  - Credit Card
  - Debit Card
  - Deposit Account Payment Code
  - Direct Debit
  - Gift cards/certificates
  - Other
  - Patron Account
  - Stored Value Card
  - Waive
2. Double-click the payment type. The **Modify: SIP Payment Types** dialog box opens.
  3. Select a Polaris payment method from the drop-down list box.

Only one Polaris payment method may be selected for each SIP payment type, but a Polaris payment method can be assigned to more than one SIP payment type. The payment method value can be blank.
  4. Click **OK**.

---

## Setting NCIP Parameters

The NCIP parameters are located on a separate tab in Polaris Administration. Another parameter that affects NCIP is on the Request tab at the System level only.

The **NCIP ILL holds: Add staff display note** is the only NCIP parameter that is available at the Library and Branch levels in Polaris Administration; all other settings are at the System level.

Use these parameters to do the following:

- Specify whether NCIP processing will be done centrally at a single location or decentralized at each participating branch location. The default is set to **Decentralized processing**. See [Set up centralized or decentralized NCIP processing](#).
- Define an “institutional patron” to be used as the borrower for interlibrary loans. Search the Polaris help for "Select an institutional patron."
- Specify the NCIP user privilege type: Public or Academic. See [Specify the NCIP user privilege type](#).
- Control automatic deletion of temporary records. See [Delete temporary records when item is checked in](#).
- Add staff display note. This parameter can be set at the library or branch level in Polaris Administration; all other options on this tab can be set at the system level only. See [Add a hold note to incoming requests](#).
- Prevent the automatic creation of hold requests in response to the ItemRequested message used by ILL. Use the **NCIP: Use unlocked hold request** parameter on the **Parameters > Request** tab. See [Prevent creation of holds in response to ILL message](#).

### Set up centralized or decentralized NCIP processing

The default setting for the NCIP Processing option is Decentralized processing, but you can change it to Central processing. Use the Central processing setting if ILL items are received at the central location and then sent to the requesting library or branch, and

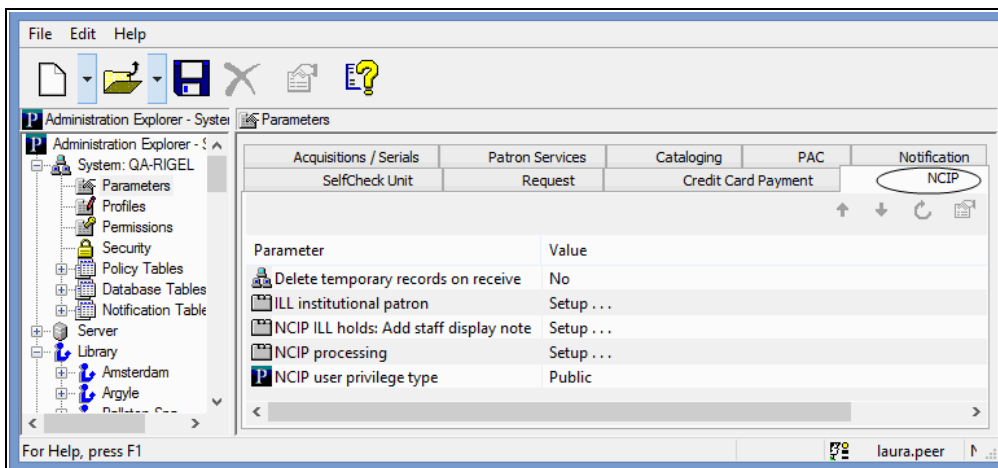
returned items are sent to the central location to be returned to the lender. The central location may be a branch or it may be a workstation within a library.

**Note:**

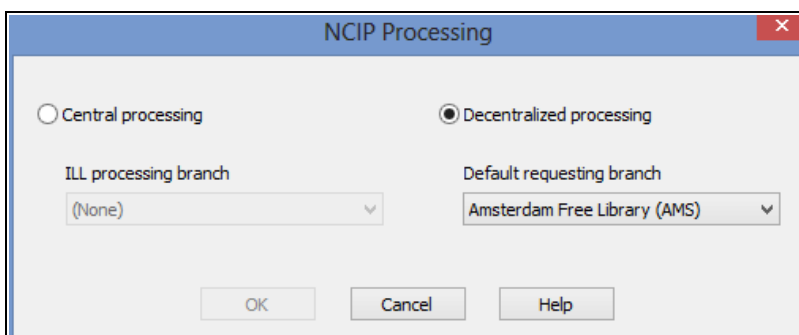
If your library or consortium uses a mixture of centralized and decentralized ILL processing, where items are received at a central location but each branch returns items directly to the lender, the Central Processing option is recommended.

To set up central or decentralized NCIP processing:

1. In the Administration Explorer tree view, open the Parameters folder at the system level and select the NCIP tabbed page in the details view.



2. Double-click **NCIP processing**. The NCIP processing dialog box opens.



3. Select one of the following options:

- **Central processing** - When this option is selected, the ILL processing branch drop-down list displays all branches in the system. Select a branch from the ILL processing branch field.
  - **Decentralized processing** - When this option is selected, the Default requesting branch drop-down list displays all branches in the system. Select a branch from the list. This branch will be substituted in cases where NCIP messaging does not include a recognizable Polaris branch to use as the pickup branch.
4. Click **OK**.

### Managing Hold Requests

Use the Request parameter, **Hold options**, to specify how your library organization manages holds. In the Administration Explorer tree view, open the **Parameters** folder for the System, and click the **Request** tab in the details view. Then, double-click **Holds options** to open the Hold Options dialog box.

See also:

- [Set Holds options: Charge for hold requests](#)
- [Set Holds options: Expiration and Unclaim limits, Deletion options](#)
- [Set Holds options: Enabling, Item Status Restrictions, First Available Copy](#)
- [Set Holds options: Exclude pickup branches](#)
- [Set Holds options: Enable patrons to change the holds pickup branch from the PAC](#)
- [Set Holds options: Preferred borrowers branches](#)
- [Set Holds options: Alerts and blocks](#)
- [Set Holds options: Trapping preferences, queue settings](#)

To allow renewals when an item is out to a patron but there are hold requests with certain statuses, the renewal is blocked by default. You can change the setting to allow renewals of these items as long as the item is not the only one available to fill the request. See [Allow renewals for items with hold requests](#).

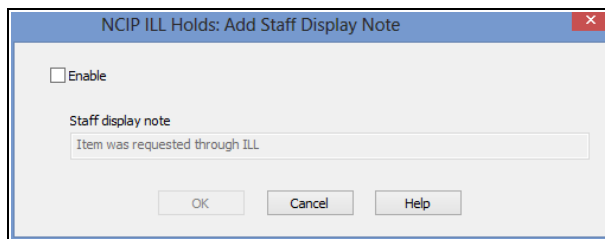
To prevent holds from being placed on a specific item, see [Restrict holds on specific items](#).

To allow patrons to place multiple holds at once from Polaris PowerPAC working or saved title lists, see the Public Access Administration PDF Guide, Bulk Hold Requests from Polaris PowerPAC Title Lists.

### Add a hold note to incoming requests

To add a hold note to incoming requests:

1. In the Administration Explorer tree view, open the Parameters folder at the system, library, or branch level, and select the NCIP tabbed page in the details view.
2. Double-click **NCIP ILL holds: Add staff display note**. The NCIP ILL holds: Add staff display note dialog box opens.



3. Select **Enable**.

The default **Item was requested through ILL** text is displayed in the Staff display note field. You can customize this text by entering up to 255 characters.

**Note:**

When enabled, the note text appears in the hold request Staff Display note that displays when trapping and also prints on the hold slip. If the other notes are added during hold request processing, the ILL note is appended to the existing text.

4. Click **OK**.

### Specify the NCIP user privilege type

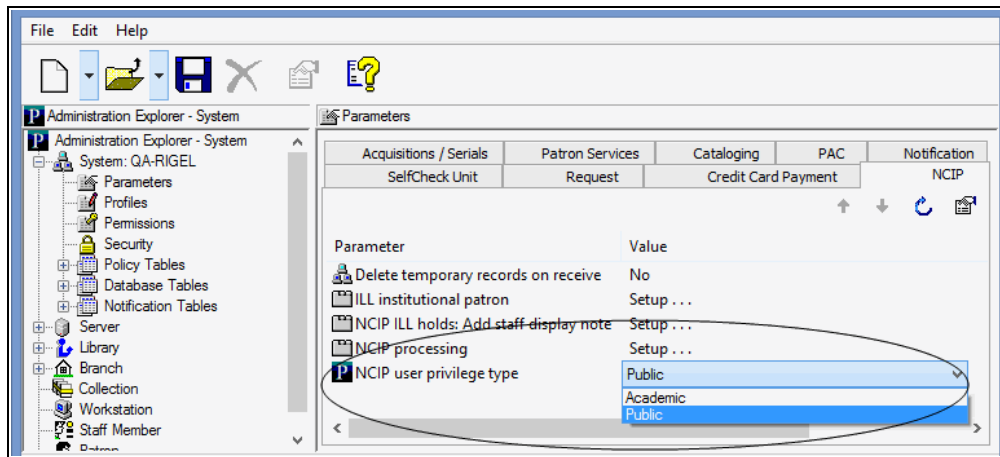
To select an academic or public library in Polaris:

**Note:**

The default is Public.

1. In the Administration Explorer tree view, open the Parameters folder at the system level, and select the NCIP tabbed page in the details view.
2. Double-click **NCIP User Privilege type**.

The drop-down list is available.



3. Select **Academic** or **Public** in the drop-down list box.
4. Select **File > Save** or press **Ctrl+S** to save the setting.

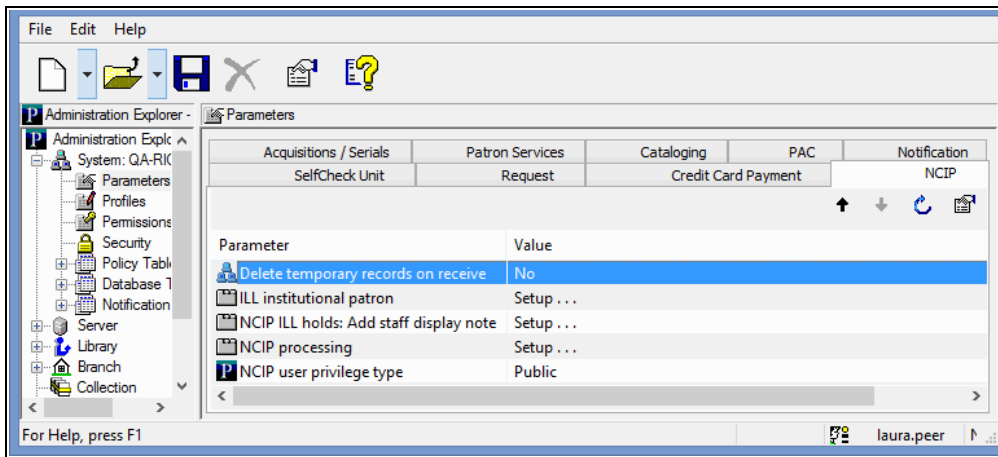
### Delete temporary records when item is checked in

The interlibrary loan application handles most ILL workflows step-by-step, including checking a requested item back in after circulation, which deletes the temporary records created in Polaris. However, some libraries may prefer checking the item in and then automatically removing the temporary records at that point. If you prefer to use this method, set the **Delete temporary records on receive** NCIP parameter to **Yes**; the default setting is **No**.

To delete temporary records when an item is checked in:

1. In the Administration Explorer tree view, open the Parameters folder at the system level, and select the NCIP tabbed page in the details view.
2. Double-click **Delete temporary records on receive**.





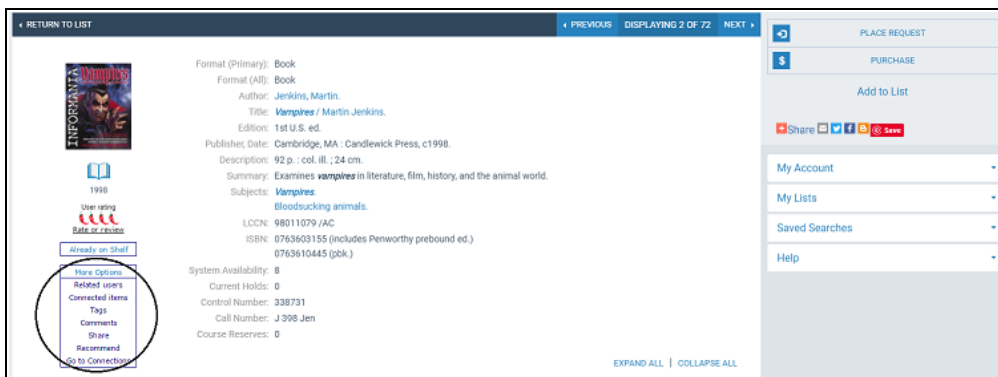
3. Select **Yes**.
4. Select **File > Save**, or press **Ctrl+S** to save the setting.

### Prevent creation of holds in response to ILL message

In NCIP processing, the hold request is created in response to the ItemRequested message used by ILL. This is early in the ILL process, and the hold request cannot be canceled or modified in Polaris. Some library systems may prefer to prevent the immediate creation of the hold request.

To prevent an automatic hold request to be placed in response to the ItemRequested message:

1. In the Administration Explorer tree view, open the Parameters folder at the System level only, and select the Request tabbed page in the details view.
2. Double-click **NCIP: Use unlocked hold request**, and select **No**.



3. Select **File > Save** or press **Ctrl+S** to save the setting.

## Setting Up Computype Label Printers

These instructions apply to Zebra printers with the Computype LabelMorphor IIE, models:

- T402
- TLP 3844Z
- Z4M Plus
- ZM400
- GX420T
- GX430T

One of the following versions of the Computype firmware must be loaded on the LabelMorphor:

- Polaris\_v1.c
- Polaris\_v2.c
- Polaris\_v3.c
- Polaris\_v4.c

The printer command is entered in the Computype Label Printer Commands database table in Polaris Administration. To find the command, go to the printer properties.

See also:

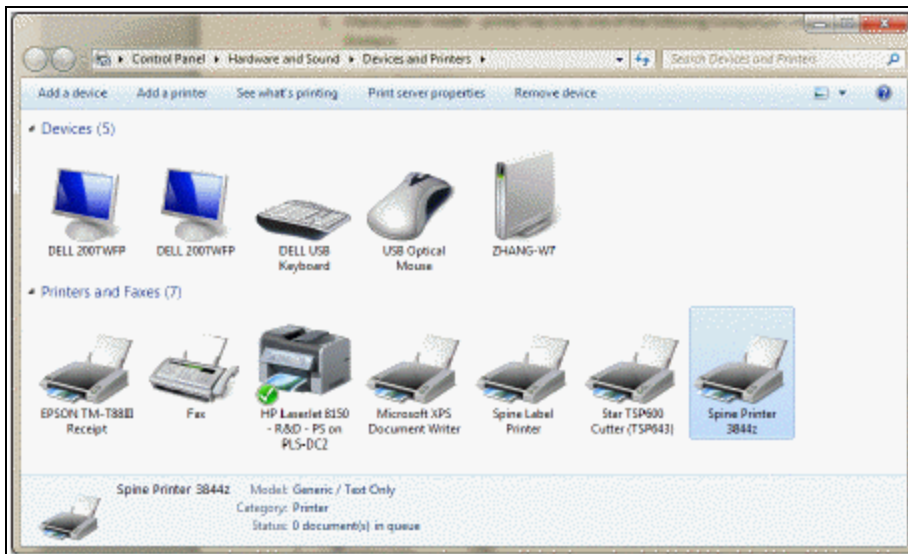
- [Find Computype printer commands](#)
- The Polaris Administration PDF Guide, Enter a Computype printer command.

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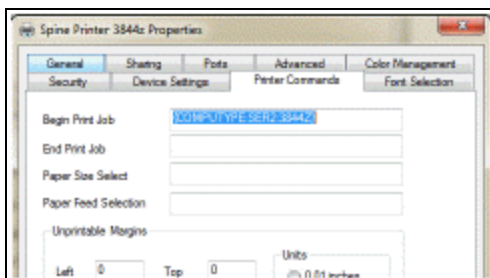
### Find Computype printer commands

To locate the Computype printer command to enter in the database table:

1. Go to the Control Panel on the computer.
2. Select **Hardware and Sound, Devices and Printers** to see the printers.



3. Select the Computype spine printer, right-click and select **Properties**. The Properties window opens.
4. Select the Printer Commands tab.



5. Select and copy the text in the **Begin Print Job** box. This is the printer command that is entered in Polaris Administration.
6. Enter the printer name and command code in the Computype Label Printer Commands database table in Polaris Administration. See the Polaris Administration PDF Guide, Enter a Computype printer command.

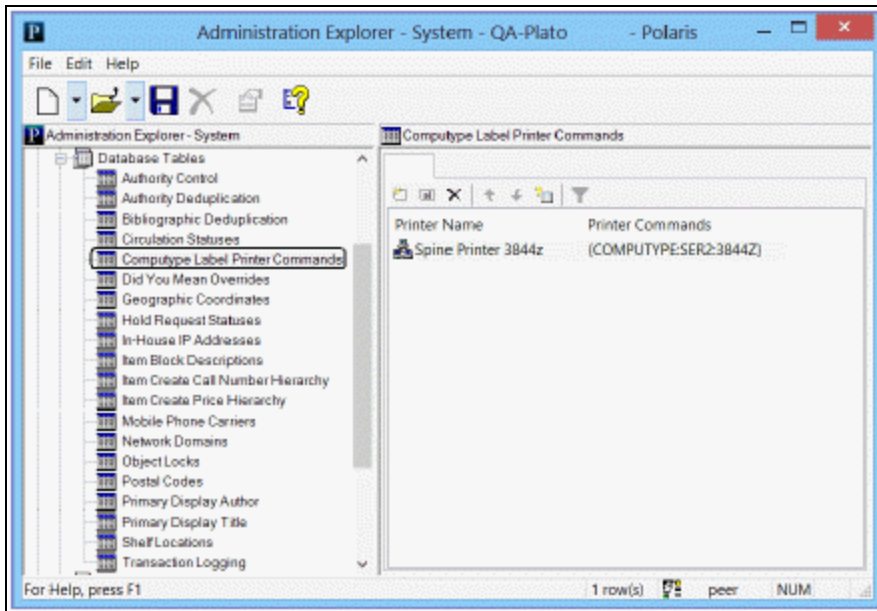
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## Enter a Computype printer command

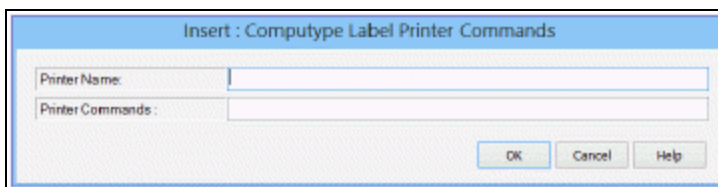
To enter a Computype printer command:

1. In the Administration Explorer tree view, select the system or organization, and select **Database tables**.

2. Double-click **Computype Label Printer Commands** to open the table.



3. Click  to insert the command. The Insert: Computype Label Printer Commands dialog box opens.



4. Enter the printer name in the **Printer Name** box.
5. Paste or enter the printer command in the **Printer Commands** box.

**Note:**

To locate and copy the printer command, see [Find Computype printer commands](#).

6. Click **OK**.

## Setting Statistical Codes for Reports

Some Polaris circulation reports depend on patron and item statistical codes. Although statistical codes are not required for Polaris to work, you must define them in the Polaris Administration policy tables Patron Statistical Class Codes and Item Statistical Class Codes to do statistical reporting.

See also:

- [Defining Patron Statistical Codes](#)
- [Defining Item Statistical Codes](#)

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## Defining Patron Statistical Class Codes

Patron statistical codes are useful for demographic or other reports an organization may require. They should not duplicate patron codes, but you can use them to make finer distinctions in patron code categories. For example, statistical codes might be defined for district residence, course major, or society membership. Unlike patron codes, statistical codes do not affect circulation limits or fine calculations. They are used for reporting purposes, and you can limit Find Tool searches for patron records by statistical class (code). The patron statistical codes are displayed for selection in the **Statistical class** box on the Patron Registration workform- General view.

You define the available statistical codes in the Patron Statistical Class Codes policy table. This table can be opened on an organization workform or with the Administration Explorer. Statistical codes can be defined from the system, library, and branch levels. If a branch needs statistical reporting, you must specify statistical codes for that branch. They are not inherited from a parent organization.

When you open this table at the system level, you can view, add, and change entries for any branch. At the library level, you can view, add, and change entries for any branch that is part of the library. At the branch level, you can view, add, and change entries for the selected branch.

**Note:**

These System Administration permissions are required to work with this table: **Access administration: Allow, Access tables: Allow, Modify patron statistical class codes table: Allow.**

### Add a patron statistical code

To add a patron statistical code to Polaris for reporting purposes:

**Note:**

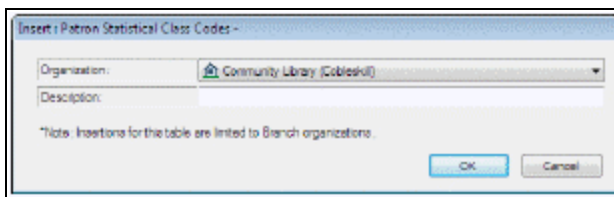
Check the table for duplicates before you enter a new statistical code. You cannot remove entries from the Patron Statistical Class Codes policy table.

1. In the Administration Explorer, expand the **Policy Tables** folder for the organization, and select **Patron Statistical Class Codes**. The Patron Statistical Class Codes table appears in the details view.

**Note:**

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

2. Click  to display the Insert Patron Statistical Class Codes dialog box.




**Note:**

If the Patron Statistical Class Codes policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

3. Select the branch in the **Organization** list to which the new statistical code belongs.
4. Type the statistical code description in the **Description** box, and click **OK**. The new entry is displayed in the Patron Statistical Class Codes policy table. **Modification pending** appears in the status bar.
5. Select **File > Save** to save your changes. **Record saved** appears in the status bar.

**Related Information**

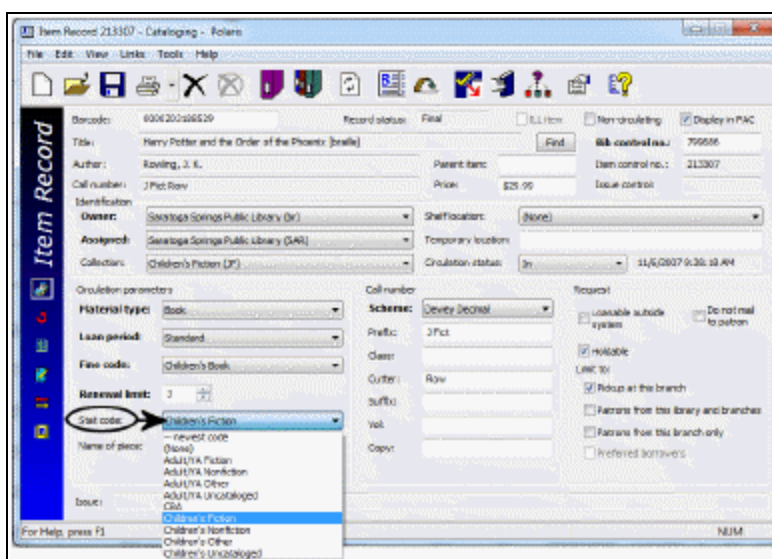
Modify a table entry - Select the entry, click , and change the description. Changes to a statistical code entry affect all patron records that used the original wording of the entry, so you should limit changes to correcting spelling or using similar wording.



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## Defining Item Statistical Codes

Item statistical codes are useful for creating specific circulation reports an organization may require. You can also limit Find Tool searches for item records by statistical code. (Unlike material type definitions, statistical codes do not affect loan limits.) Statistical codes should not duplicate material type, collection, or genre descriptions, but you can use them to make finer distinctions for any of these. For example, a branch might define item statistical codes for Adult Books on Compact Disc and Comic Books, among others. As another example, some libraries use these codes to break out shelving areas into smaller units for reporting purposes, so that Adult Non-Fiction is broken down with a statistical code for call numbers 000-099, another for 100-199, another for 200-299, and so forth. The item statistical codes are displayed for selection in the **Statistical code** box on the Item Record workflow.



You define the available statistical codes in the Item Statistical Class Codes policy table. The policy table can be opened on an organization workflow or with the Administration Explorer. If a branch needs statistical reporting, you must specify statistical codes for that branch because they are not inherited from parent organizations.

When you open the policy table at the system level, you can view, add, and change entries for any branch. At the library level, you can view, add, and change entries for any branch that is part of the library. At the branch level, you can view, add, and change entries for the selected branch.

**Note:**

These System Administration permissions are required to work with this table: **Access administration: Allow, Access tables: Allow, Modify item statistical class codes table: Allow.**

**Add an item statistical code**

To add an item statistical code for reporting purposes:

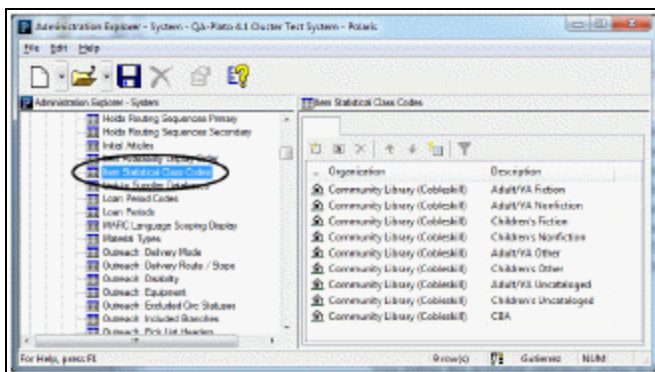
**Note:**


Check the table for duplicates before you enter a new statistical code. You cannot remove entries from the Item Statistical Class Codes table.

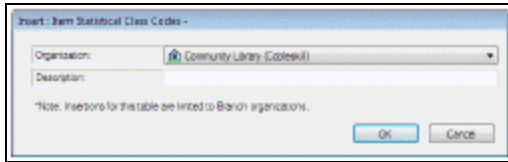
1. In the Administration Explorer, expand the **Policy Tables** folder for the organization, and select **Item Statistical Class Codes**. The Item Statistical Class Codes table appears in the details view.

**Note:**

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.



2. Click  to display the Insert Item Statistical Class Codes dialog box.




**Note:**

If the Item Statistical Class Codes policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

3. Select the branch in the **Organization** list to which the new statistical category belongs.
4. Type text describing the statistical classification in the **Description** box.
5. Click **OK**. The new entry is displayed in the Item Statistical Class Codes policy table. **Modification pending** appears in the status bar.
6. Select **File > Save** to save your changes. **Record saved** appears in the status bar.

**Related Information**

Modify a table entry - Select the entry, click , and change the description. Changes to a statistical code entry affect all item records that used the original wording of the entry, so you should limit changes in statistical descriptions to correcting spelling and using similar wording for a given statistical code.

## Circulation and Patron Services Workflow Permissions

This section lists the combinations of permissions needed to do common circulation and patron services workflows. For a staff member to do a task at a particular workstation, both the staff member and the workstation need the appropriate permissions.

**Note:**

For an alphabetical list of all circulation permissions, see [Circulation Permissions Reference](#). For more information about setting permissions in Polaris, see the Polaris Administration PDF Guide, Granting Permissions.

Workflow	Required Permissions	Administration Explorer Security Location
<b>Checking Out and Renewing</b>		
Check out and renew materials - minimum	Access circulation control: Allow Patron registration: Access Renew items: Allow Item records: Access	System - Circulation Branch - Circulation System - Circulation Branch - Cataloging
Modify a fine amount for a specific overdue item during renewal	Modify fine amount: Allow	System - Circulation
Renew items from patron account	Patron status: Modify patron account Renew items: Allow Renew overdue items: Allow	Branch - Circulation System - Circulation System - Circulation
Renew items that fill hold requests	Renew items: Allow Renew items with holds: Allow	System - Circulation System - Circulation
Override an age restriction block to	Override age restrictions: Allow	System-Circulation

Workflow	Required Permissions	Administration Explorer Security Location
<p>check out an item or place a hold request for a patron</p> <p>For more information on this feature, see "Using Age-Related Loan Policies" in the Leap documentation.</p>		
<p>Override a circ block to check out an item to a patron who has a blocked associated patron record</p>	<p>Override associated patron block: Allow</p> <p>The staff member must also have permission to override the specific block on the associated patron record.</p>	System - Circulation
<p>Override a circ block to check out an item, renew an item, or enter a new claim for a patron who has exceeded the current claims or total claimed items limit</p>	<p>Override claimed item limits: Allow</p>	System - Circulation
<p>Override a circ block to check out an item that has library-assigned blocks</p>	<p>Override item assigned blocks: Allow</p>	System - Circulation
<p>Override a circ block to check out an item that has a free-text block</p>	<p>Override item free-text blocks: Allow</p>	System - Circulation
<p>Override a circ block to check out an item that exceeds the limit for</p>	<p>Override item limit blocks: Allow</p>	System - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
items out by material type, total items out, material type group, or reserve items out		
Override a circ block to check out an item to a patron who has exceeded the limit for overdue or long overdue items	Override overdue limit: Allow	System - Circulation
Override a circ block to check out an item to a patron with library-assigned blocks	Override patron assigned blocks: Allow	System - Circulation
Override a circ block to check out an item to a patron with a blocking note	Override patron blocking note: Allow	System - Circulation
Override a circ block to check out an item to a patron with a free-text block	Override patron free-text blocks: Allow	System - Circulation
Override a circ block to check out an item to a patron who has exceeded the total request limit, a request limit by material type, or the ILL request limit	Override request limits: Allow	System - Circulation
Override second-level fine block during checkout	Fines: override 2nd level fine block: Allow	System - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
Override renewal blocks	Renew overdue items: Allow Override renewal limit blocks: Allow	System - Circulation System - Circulation
Override block if patron's account is in collection	Override collection agency block: Allow	System - Circulation
Create or delete patron blocks during checkout	Patron status: Create/delete patron blocks	Branch - Circulation
Express-register a patron during checkout	Patron registration: Create express registration record	Branch - Circulation
Override blocks during checkout for items pending in the hold queue	Override request blocks: Allow	System - Circulation
Override blocks during checkout for items that do not circulate	Override non-circulating blocks: Allow	System - Circulation
Do express cataloging during checkout for items not found in the database	Create on-the-fly records: Allow	System - Circulation
Set special loan periods during checkout	Modify due date and time: Allow	System - Circulation
Set special loan periods for a renewal	Modify renewal period: Allow Patron status: Access Patron status: Display items checked-out Patron status: Modify patron account	System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
Set a new due date for items already checked out	Reset due date: Allow	System - Circulation
Customize the message text on checkout receipts	Modify receipt message text: Allow	System - Circulation
<b>Receiving Payments</b>		
Receive payments for fines and fees	Create a patron account credit: Allow Fines: pay fines at circ: Allow Patron status: Access Patron status: Access patron account Patron status: Access patron account: transaction summary Patron status: Modify patron account	System - Circulation System - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation
Receive credit card payments, issue refunds to credit card accounts	Fines: Allow credit card payments Fines: Allow refunds Access Credit Card Payments Manager: Allow	System - Circulation System - Circulation System - Circulation
<b>Waiving Patron Fines</b>		
Waive patron fines	Fines: waive fines at circ: Allow	System - Circulation
Submit waive requests	Fines: Submit Waiver Requests	System - Circulation



Workflow	Required Permissions	Administration Explorer Security Location
Review waive requests	Fines: Approve waiver request for user threshold Fines: Decline waiver requests	System - Circulation
<b>Checking In Items</b>		
Check in materials at the circulation desk	Access circulation control: Allow Circulation check in workform: Access Normal mode	System - Circulation System - Circulation
Check in materials from the book drop	Access circulation control: Allow Circulation check in workform: Access Bulk mode	System - Circulation System - Circulation
Change the default number of free days at normal, bulk, or offline check-in	Access circulation control: Allow Modify free days: Allow	System - Circulation System - Circulation
Change the collection of a checked in item from the Check In workform	Access circulation control: Allow Manage item dialogs: Modify assigned collection	System - Circulation System, Library, Branch - Circulation
Change the barcode of a checked in item from the Check In workform	Access circulation control: Allow Manage item dialogs: Modify barcode	System - Circulation System, Library, Branch - Circulation
Change a library-assigned or free-text block of a checked in item from the Check In workform	Access circulation control: Allow Manage item dialogs: Modify blocks	System - Circulation System, Library, Branch - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
Change the circulation status of a checked in item (from In to In-repair, Unavailable, or Bindery) from the Check In workflow	Access circulation control: Allow Manage item dialogs: Modify circulation status	System - Circulation System, Library, Branch - Circulation
Change the material type of a checked in item from the Check In workflow	Access circulation control: Allow Manage item dialogs: Modify material type	System - Circulation System, Library, Branch - Circulation
Change the non-public note of a checked in item from the Check In workflow	Access circulation control: Allow Manage item dialogs: Modify notes	System - Circulation System, Library, Branch - Circulation
Change the shelf location of a checked in item from the Check In workflow	Access circulation control: Allow Manage item dialogs: Modify shelf location	System - Circulation System, Library, Branch - Circulation
Change the circulation status of a checked in item (from In to Withdrawn) from the Check In workflow	Access circulation control: Allow Manage item dialogs: Withdraw items	System - Circulation System, Library, Branch - Circulation
Check in materials that have been used in the library	Access circulation control: Allow Circulation check in workflow: Access In-House mode	System - Circulation System - Circulation
Take an item inventory	Access circulation control: Allow	System - Circulation System - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
	Circulation check in workform: Access Inventory mode	
<b>Receiving and Checking In Shelf-Ready Acquisitions Items</b>		
Check in new shelf-ready materials at the loading dock	Access Acquisitions: Allow Check in shelf-ready materials: Allow	System - Acquisitions System - Acquisitions
<b>Circulating Ephemeral Items (Polaris Quick-Circ)</b>		
Work with quick-circ item records	Quick-circ item records: Access Quick-circ item records: Create Quick-circ item records: Delete Quick-circ item records: Modify	Branch - Cataloging Branch - Cataloging Branch - Cataloging Branch - Cataloging
<b>Working with Patron Records</b>		
Answer questions from patrons about their accounts; work with deposits	Access patron services: Allow Create, return or forfeit a patron account deposit Patron status: Access Patron status: Access notice history Patron status: Access patron account Patron status: Display associations Patron status: Display claimed items Patron status: Display hold request list	System - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
	Patron status: Display items checked-out Patron status: Display notes Patron status: Display patron blocks Patron status: Display reader services (reading histories and Outreach Services)	
Add a charge or select an existing charge and bill the patron	Access patron services: Allow Patron status: Access Patron status: Access notice history Patron status: Access patron account Bill a charge manually	Branch Staff member Workstation
Register patrons	Access patron services: Allow Create patron associations: Allow Patron registration: Access Patron registration: Create Override invalid patron barcode message: Allow Patron registration: Create express registration record Patron registration: Modify Patron registration: Modify	System - Circulation System - Circulation Branch - Circulation Branch - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
	<p>postal address fields</p> <p>Note: With this permission, you can enter a postal code/city/state/country combination in the patron record that does not already exist in the system postal code table. When the record is saved, the new combination is added to the system postal code table. Without this permission, you can edit only the street address or select an existing combination.</p>	
<p>Maintain patron registration records</p>	<p>Access circulation control: Allow</p> <p>Access patron record bulk change: Allow</p> <p>Access patron services: Allow</p> <p>Create patron associations: Allow</p> <p>Delete patron associations: Allow</p> <p>Merge patrons: Allow</p> <p>Patron record sets: Access</p> <p>Patron record sets: Create</p> <p>Patron record sets: Delete/Undelete</p> <p>Patron record sets: Export</p>	<p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>Branch - Circulation</p>

Workflow	Required Permissions	Administration Explorer Security Location
	<p>Patron record sets: Modify</p> <p>Patron registration: Access</p> <p>Patron registration: Delete</p> <p>Patron registration: Modify (also needed to bulk-change patron records for an organization)</p> <p>Patron status: Access</p> <p>Patron status: Display associations</p> <p>Patron status: Display reader services (reading histories and Outreach Services)</p> <p>Patron status: Modify notes</p> <p>Patron status: Modify patron account</p> <p>Reading history: Remove non-ORS patron history entries: Allow (remove individual items from reading history) This permission is also required: Patron Status: Modify reader services.</p> <p>Reading history: Remove ORS patron history entries: Allow (remove individual items from reading history) This permission is also required: Patron Status: Modify reader services.</p>	<p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p>

Workflow	Required Permissions	Administration Explorer Security Location
	Use 'own' patron record sets: Allow Post patron message Delete patron message Modify photo IDs: Allow (licensed feature) Delete photo IDs: Allow (licensed feature)	
Suppress warning messages when deleting multiple patron records	Suppress warnings for unbreakable links, and other stopping conditions, when deleting multiple patron records: Allow Suppress warnings for breakable links when deleting multiple patron records: Allow	System - Circulation System - Circulation
Override the blocks that prevent deleting patron registration records	Patron registration: Override blocks to delete	Branch - Circulation
Alter replacement and processing fees when declaring an item lost or damaged	Modify lost/damaged item amount: Allow	System - Circulation
<b>Working with Hold and ILL Requests</b>		
Generate hold and interlibrary loan requests for a patron	Hold requests: Create ILL requests: Convert holds Patron status: Access Bibliographic Records: Access	Branch - Circulation Branch - Circulation Branch - Circulation System, Library, Branch - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
	Item Records: Access	System, Library, Branch - Cataloging
Cancel a hold or interlibrary loan request from the Patron Status workflow	Patron status: Access Patron status: Display hold request list Patron status: Modify patron account Bibliographic Records - Access Item Records - Access	Branch - Circulation Branch - Circulation Branch - Circulation System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Manage hold requests	Access circulation control: Allow Access hold request manager: Allow Display hold-request queues: Allow Modify hold queues: Allow Hold requests: Modify PAC display note Hold requests: Access Hold requests: Delete Hold requests: Deny item request Hold requests: Modify ILL requests: Convert holds Patron registration: Access Patron status: Access Patron status: Display hold	System - Circulation System - Circulation System - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation System, Library, Branch - Cataloging System, Library, Branch - Cataloging



Workflow	Required Permissions	Administration Explorer Security Location
	request list Bibliographic Records: Access Item Records: Access	
Managing interlibrary loan requests	Access circulation control: Allow Access ILL request manager: Allow ILL requests: Access ILL requests: Create ILL requests: Delete ILL requests: Modify Patron registration: Access Patron status: Access Patron status: Display hold request list Bibliographic Records: Access Item Records : Access	System - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation System, Library, Branch - Cataloging System, Library, Branch - Cataloging
<b>Working with Course Reserves</b>		
Designate instructors for course reserve records	Patron registration: Access Patron registration: Create Patron registration: Delete Patron registration: Modify	Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation
Create and manage course reserve records	Auto delete processing of reserve item records: Allow (for deleting temporary item and bibliographic records when	System- Cataloging System, Library, Branch - Cataloging System, Library, Branch -

Workflow	Required Permissions	Administration Explorer Security Location
	a “disposable” or instructor-owned item is taken off reserve)	Cataloging
	Course reserve records: Access	System, Library, Branch - Cataloging
	Course reserve records: Create	System, Library, Branch - Cataloging
	Course reserve records: Delete	System, Library, Branch - Cataloging
	Course reserve records: Modify	System, Library, Branch - Cataloging
	Course reserve templates: Access	System, Library, Branch - Cataloging
	Course reserve templates: Create	System, Library, Branch - Cataloging
	Course reserve templates: Delete	System, Library, Branch - Cataloging
	Course reserve templates: Modify	System, Library, Branch - Cataloging
	Item records: Access	System, Library, Branch - Cataloging
	Item records: Create	System, Library, Branch - Cataloging
	Item records: Delete	System, Library, Branch - Cataloging
	Item records: Modify reserves view	System, Library, Branch - Cataloging
	Item templates: Access	System, Library, Branch - Cataloging
	Item templates: Create	System, Library, Branch - Cataloging
	Item templates: Delete	System, Library, Branch - Cataloging
	Reserve item templates: Access	System, Library, Branch - Cataloging
	Reserve item templates: Create	System, Library, Branch - Cataloging
	Reserve item templates: Delete	System, Library, Branch - Cataloging
	Reserve item templates: Modify	System, Library, Branch - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
	Bibliographic records: Create (for on-the-fly items)	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
<b>Working with Outreach Services</b>		
View outreach services for individual patrons	Patron status: Access	Branch - Circulation
	Patron status: Display reader services	Branch - Circulation
Modify outreach services settings for individual patrons	Patron status: Modify reader services	Branch - Circulation
Manage outreach services for multiple patrons	Outreach Services Manager: Access	Branch - Circulation
Modify reader ratings for ORS patrons	Modify ORS patron ratings: Allow	System, Library, Branch - Circulation
From bib record, display list of ORS patrons with linked items in their reading histories	ORS: Link from bibliographic record: Allow	System - Circulation
<b>Working with Patron Accounts in Collections</b>		
Remove a specific amount on a patron's account from collection agency reporting	Patron status: Access Patron status: Access patron account	Branch - Circulation Branch - Circulation Branch - Circulation

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Patron status: Modify patron account Remove collection agency block: Allow	System - Circulation

## Circulation Permissions Reference

These permissions are available under **Security > Circulation** at the listed organizational levels on the Administration Explorer. They control the ability to perform patron services and circulation tasks.

Control Record	Org Levels	Permissions	Description
Access bookmobile	System	Allow	Open the Bookmobile workflow. This workflow is used to select and upload offline transaction files. User can retrieve transaction files created during offline operations.
Access circulation control	System	Allow	Open the Circulation menu on the Polaris Shortcut Bar. Check in materials, check-out materials, process holds or ILL requests, and accept fee and fine payments.
Access Credit Card Payments Manager	System	Allow	Open the Credit Cards Payment Manager from the Utilities menu on the Polaris Shortcut Bar. Work with the Credit Card Payments Manager.
Access hold request manager	Branch	Allow	Open and use the Holds view on the Request Manager workflow to process and manage hold requests.
Access ILL request manager	Branch	Allow	Open and use the ILL view on the Request Manager workflow to process and manage interlibrary loan requests.

Control Record	Org Levels	Permissions	Description
Access notice history	Branch	Allow	Open the Notice History dialog from the Polaris Status workform and view the notice history for a specific item.
Access patron record bulk change	System	Allow	Use the Bulk Change option on the Record Set workform, Tools menu to change multiple patron records. To change records for a specific Registered at branch, the user also needs the permission <b>Patron registration: Modify for that branch.</b>
Access patron services	System	Allow	Open the Patron Services menu on the Polaris Shortcut Bar to register patrons and manage patron records/services.
Circulation check-in workform	System	Access Bulk Mode; Access In-house mode; Access Inventory mode; Access Normal mode	Access specific views of the Check-in workform to: do bulk check-ins; check in items that were used in the library but did not circulate outside of the library; check in items in normal mode at the circulation desk; and take item inventory.
Close ExpressCheck	System	Allow	Exit the Polaris ExpressCheck application at a self-check workstation.
Create a patron account credit	System	Allow	Accept overpayments from patrons and post credits to patron accounts.

Control Record	Org Levels	Permissions	Description
Create on-the fly records	System	Allow	Create brief records that enable an item to circulate.
Create patron associations	System	Allow	Open the Associations view on the Patron Status workform, and add patron associations.
Create, return or forfeit a patron account deposit	System	Allow	Work with deposits in the Patron Status workform, Account view
Delete patron associations	System	Allow	Use the Delete option in the Associations view of the Patron Status workform to remove the links between patron records.
Delete patron message	System	Allow	Remove a posted message from a patron record.
Delete photo IDs	System	Allow	Delete a patron photo from the Patron Photo view of the Patron Registration workform.
Display hold-request queues	System	Allow	Display the Holds Queue workform; process hold requests at any branch.
Fines: Allow credit card payments	System	Allow	Select Credit Card as payment method and input credit card information when a credit card is used to pay a fine or fee.
Fines: Allow refunds	System	Allow	Refund one or all payments from the Patron Status or Store Order workform.
Fines: Approve waiver requests	System	Allow	Approve a waiver request for a patron's fees in the Approval Dashboard.

Control Record	Org Levels	Permissions	Description
for user threshold			
Fines: Decline waiver requests	System	Allow	Decline a waiver request for a patron's fees in the Approval Dashboard.
Fines: override 2nd level fine block	System	Allow	Override a second-level fine block to allow patrons to check out.
Fines: pay fines at circ	System	Allow	Select Pay on the Fines Block dialog to pay a patron's fines during check-out, renewal, or check-in.
Fines: Submit waiver requests	System	Allow	Select Waiver Request on the patron record workform > Account view to start the waiver process for a patron's fees.
Fines: waive fines at circ	System	Allow	Select Waive on the Fines Block dialog to waive a patron's fines during check-out.
Hold requests	Branch	Access; Ask me later; Create; Delete; Deny item request; Locate/Return; Modify; Modify PAC display note; Reactivate request	Each branch that processes hold requests assigns permissions for staff members to manage holds for their branch. Staff members who have the permission <b>Modify PAC display note</b> can change the note that displays for held items in the PAC.
ILL requests	Branch	Access; Delete; Modify; Convert	Each branch that handles



Control Record	Org Levels	Permissions	Description
		holds	interlibrary loan requests assigns permissions for staff members who manage ILL requests. Staff members with the permission <b>Convert holds</b> can convert a hold request to an ILL request.
Manage item dialogs	System, Library, Branch	Modify assigned collection; Modify barcode; Modify blocks; Modify circulation status; Modify material type; Modify notes; Modify shelf location; Withdraw items	Change specific aspects of selected item records from the Check-in workflow, without accessing the records. The items must have a status of In and belong to the branch associated with the logged-in workstation.
Merge patrons	System	Allow	Use the Patron Merge dialog, available from the Tools menu on the Patron Registration workflow to merge information from the secondary patron into the primary patron's record, and delete the secondary record.
Modify due date and time	System	Allow	Select Special on the Check Out workflow, and use the Special Loan dialog to set a special due date and time during check-out.
Modify fine amount	System	Allow	Change the fine amount in the Overdue Fine dialog when an overdue item is checked in or

Control Record	Org Levels	Permissions	Description
			renewed.
Modify free days	System	Allow	Type a new number of days in the Free days box on the Check In workform to change the default number of free days (days exempt from overdue fines) when an item is checked in.
Modify hold queues	System	Allow	Change the position of holds on the Holds Queue workform.
Modify lost/damaged item amount	System	Allow	Change the amount of the replacement charge or processing fee when declaring an item lost or damaged. You can edit these amounts in the Declare Lost Item dialog or the Declare Damaged Item dialog.  Note: You can only declare an item damaged when you are working in Leap. For more information, search for "Check In a Damaged Item" or "Declare an Item Lost or Damaged" in the Leap help.
Modify ORS patron ratings	System, Library, Branch	Allow	Select items from the Patron Status workform, Reader Services view and add or modify the patron's ratings, including notes.
Modify photo IDs	System	Allow	On the Patron Registration workform, Patron Photo view, add or replace a patron photo.

Control Record	Org Levels	Permissions	Description
Modify receipt message text	System	Allow	Edit and save the message text on the Circulation, Options, Receipt Printer Options tabbed page.
Modify renewal period	System	Allow	Select Special Renew on the Items Out view of the Patron Status workflow to set a special renewal loan period for a checked-out item.
ORS: Link from bibliographic record	System	Allow	Select <b>Links, Outreach Patrons</b> in the Bibliographic Record workflow or right-click a bibliographic record in the Find Tool results list, and select Links, Outreach Patrons to display the list of linked patrons whose reading histories include items linked to the bibliographic record. (Outreach Services must also be licensed for the staff member's logged-in workstation.)
Outreach Services Manager	Branch	Access	Open the Outreach Services Manager workflow and process outreach services for multiple patrons.
Override age restrictions	System	Allow	Continue a checkout or placing a hold request for a patron who is blocked due to age restrictions for a specific material type.  For more information on this

Control Record	Org Levels	Permissions	Description
			feature, see "Using Age-Related Loan Policies" in the Leap documentation.
Override associated patron block	System	Allow	Continue a checkout or renewal for a patron whose associated patrons are blocked. Both this permission and the permission to override the specific block are required to continue a checkout.
Override claimed item limits	System	Allow	Continue a checkout, continue a renewal, and add new claims for a patron who has exceeded the current or total claimed items limit.
Override collection agency block	System		Continue a checkout or renewal for a patron who is blocked because their account has been referred to a collection agency.
Override invalid patron barcode message	System	Allow	Continue to save a patron record when an invalid barcode message is displayed.
Override item assigned blocks	System	Allow	Continue a checkout or renewal when the item has library-assigned blocks.
Override item free-text blocks	System	Allow	Continue a checkout or renewal when the item has a free-text block.
Override item limit blocks	System	Allow	Continue a checkout or renewal when the item exceeds the items out limits

Control Record	Org Levels	Permissions	Description
			have been reached for: material type, total items out, or reserve items out.
Override non-circulating blocks	System	Allow	Continue a checkout or renewal when the item is non-circulating; when the material type limit for that patron code is set to 0 in the Patron Material Type Loan Limits policy table; or when the loan period is set to 0 in the Loan Periods policy table.
Override overdue limit	System	Allow	Continue a checkout or renewal operation for a patron who has exceeded the limit for overdue or long overdue items.
Override patron assigned blocks	System	Allow	Continue a checkout or renewal for a patron who has a library-assigned block on their patron record.
Override patron free-text blocks	System	Allow	Continue a checkout or renewal for a patron with a free-text block on the patron record.
Override renewal limit blocks	System	Allow	Continue a checkout or renewal for a patron with free-text block on the patron record
Override request blocks	System	Allow	Continue to create a hold request when a patron or item block occurs.
Override request limits	System	Allow	Continue to create a hold request when a message

Control Record	Org Levels	Permissions	Description
			blocks the request because the patron exceeded the request limit.
Patron claims: Reset total claim count	System	Allow	On the Patron Status workform - Claims view, reset a patron's total (lifetime) claims to 0.
Patron privileges	System	Modify	For staff to access the following patron preferences on the patron record: Extended Loan Period Increased Check Out Limit
Patron record sets	System, Library, Branch	Access; Create; Delete/Undelete; Export; Modify	Each organization that owns patron record sets assigns permissions to the staff members who work with patron record sets belonging to that organization.  The Export permission lets you export patron record sets from Leap to Excel.  <b>Note:</b> You can only export record sets owned at the System, Library, or Branch level. Record sets owned by individuals cannot be exported.
Patron registration	Branch	Access; Create; Create express registration record;Delete; Modify; Modify postal address fields; Override	Each branch assigns permissions for staff members to access the Patron Registration workform, edit the information, and delete patron registration records for

Control Record	Org Levels	Permissions	Description
		blocks to delete	patrons registered at that branch. The <b>Modify postal address fields</b> permission allows staff members to enter a city/state/county/postal code combination that does not already exist in the postal codes table. (The new combination is added to the table when the records saved.)
Patron status	Branch	Access; Access notice history; Access patron account;  Access patron account: Transaction summary  Bill a charge manually    Create/delete patron blocks;  Display	Each branch assigns permissions for staff members to access account information for patrons registered at that branch.  Access permissions allow staff members to access all patron status (account) information or specific patron account views.  Bill a charge manually allows users with this permission in addition to Access and Modify patron account permissions, to bill a charge manually.  Display permissions indicate the patron status information that is displayed.  Modify permissions allow staff

Control Record	Org Levels	Permissions	Description
		associations; Display claimed items; Display hold request list; Display items checked-out; Display notes; Display patron blocks; Display reader services;  Modify notes; Modify patron account; Modify reader services  Patron record: Release; Patron record: Secure	to change information in the patron's account.  Patron record secure and release permissions allow staff to secure a patron record to prevent check outs and other library activity, and then release the record to resume library activity.
Picklist application	System, Branch	Allow  Modify circulation status	Use the Picklist in the Polaris Web App (Leap).  Modify an item's circulation status from the Picklist in the Polaris Web App (Leap)
Post patron message	System	Allow	Use the Add message and Modify message options in the Notes view of the Patron Status workflow to add a



Control Record	Org Levels	Permissions	Description
			message that the patron can read and delete from their patron account in the PAC.
Reading history: Remove non-ORS patron history entries	System, Library, Branch	Allow	Select and remove individual items from the Reading History list on the Patron Status workform, Reader Services view. The Patron Status: Modify reader services is also required.
Reading history: Remove ORS patron history entries	System, Library, Branch	Allow	Select and remove individual items from an outreach services patron's reading history. The Patron Status: Modify reader services is also required.
Remove collection agency block	System	Allow	Select and remove specific charges for a patron from collection agency reporting.
Renew items	System	Allow	Renew items
Renew items with holds	System	Allow	Renew items with hold requests
Renew overdue items	System	Allow	Renew items that are overdue
Reset due date	System	Allow	Reset the due date of checked out items
Special item check in	System, Library, Branch	Access; Select damaged; Select missing part; Select unavailable	Access - Access the Special Item Check-In dialog in the staff client and the Missing Part and Damaged views of the Check In workform in Leap.

Control Record	Org Levels	Permissions	Description
			<p>Select damaged - Check in a damaged item in Leap.</p> <p>Select missing part, Select unavailable - Check in (in the staff client or in Leap) multi-part items that are missing a part or parts.</p>
Suppress warnings for breakable links when deleting multiple patron records	System	Allow	A staff member with this permission can clear the <b>Warn me about breakable links</b> box when deleting multiple patron records so that these warnings do not appear for each record that has breakable links.
Suppress warnings for unbreakable links, and other stopping conditions, when deleting multiple patron records	System	Allow	A staff member with this permission can clear the <b>Warn me about unbreakable links and other stopping conditions</b> box when deleting multiple patron records so that these warnings do not appear for each record that has unbreakable links.
Use 'own' patron record sets	System	Allow	Create and maintain patron record sets owned by an individual staff member or group.

## Managing Hold Requests

Use the Request parameter, **Hold options**, to specify how your library organization manages holds. In the Administration Explorer tree view, open the **Parameters** folder for the System, and click the **Request** tab in the details view. Then, double-click **Holds options** to open the Hold Options dialog box.

See also:

- [Set Holds options: Charge for hold requests](#)
- [Set Holds options: Expiration and Unclaim limits, Deletion options](#)
- [Set Holds options: Enabling, Item Status Restrictions, First Available Copy](#)
- [Set Holds options: Exclude pickup branches](#)
- [Set Holds options: Enable patrons to change the holds pickup branch from the PAC](#)
- [Set Holds options: Preferred borrowers branches](#)
- [Set Holds options: Alerts and blocks](#)
- [Set Holds options: Trapping preferences, queue settings](#)

To allow renewals when an item is out to a patron but there are hold requests with certain statuses, the renewal is blocked by default. You can change the setting to allow renewals of these items as long as the item is not the only one available to fill the request. See [Allow renewals for items with hold requests](#).

To prevent holds from being placed on a specific item, see [Restrict holds on specific items](#).

To allow patrons to place multiple holds at once from Polaris PowerPAC working or saved title lists, see the Public Access Administration PDF Guide, Bulk Hold Requests from Polaris PowerPAC Title Lists.

## Patron Services Parameters Reference

These parameters are available on the **Parameters > Patron Services** tab on the Administration Explorer, at the listed organizational levels.

**Note:**

Separate sets of parameters affect hold requests, notification, and self-check circulation. See [Request Parameters Reference](#), [Notification Parameters Reference](#), and [Self-Check Parameters Reference](#).

Parameter	Org Level	Description	Default Setting
Account transaction deletion	System, Library, Branch	Specifies whether finished transactions older than a specified period are deleted from the patron's transaction summary. Double-click to display the Finished Transaction deletion setup dialog box. See <a href="#">Setting Patron Accounting Options</a> . This setting also determines how long certain patron account data from deleted patron records is saved for cash reports. See <a href="#">Retaining Financial Information for Deleted Patron Records</a> .	Not enabled (transactions are not deleted); if enabled, default period is 3 years.
Accrued fine options	System	Determines whether to include claimed items and/or lost items in estimated accrued fine calculations; determines whether to include estimated accrued fines in blocking calculations. See <a href="#">Calculating and Blocking for Estimated Accrued Fines</a> .	No options selected
Address verification	System	Opens the Address Verification dialog box where you can enable	—

Parameter	Org Level	Description	Default Setting
		address verification, specify the URL for the verification service, and set an expiration term.	
Associated patron options	System, Library, Branch	Sets a limit on the number of records that can be associated with one patron record, specifies the defaults for whether primary patrons are allowed to pick up held items for their associated patrons, and whether the primary patron is blocked when associated patrons are blocked. See Associated Patron Blocking.	20; do not block; do not allow pickup
Check-in: auto-charge fine from item work form and find tool context menu	System, Library, Branch	Determines whether overdue fines are automatically charged to the patron account when overdue items are checked in from the Item workform, the Find Tool context menu, or the Patron Status workform - Items Out view. When the parameter is set to <b>Yes</b> and an overdue item is checked in, the fine is automatically charged to the patron account. If the overdue item can fill an active hold request, the hold request message appears and the staff member takes action on the hold request message. (When the parameter is set to <b>Yes</b> and a billed item is checked in, the Resolve lost/billed item dialog box appears, the staff member resolves the billed charges, and the	Yes

Parameter	Org Level	Description	Default Setting
		item is checked in. If the billed item can fill a request, the hold request message appears before the Resolve lost/billed item dialog box. The staff member takes action on the hold request message first.) If the parameter is set to <b>No</b> , the Check In - Fine dialog box appears when the item is overdue, and the staff member resolves the fine accordingly. However, if the item can fill a hold request, the hold request message always appears first.	
Check-in: Listview options	System, Library, Branch	Specifies which optional columns ( <b>Title, Material Type, Patron Name</b> ) appear on the Check In workform's <b>Items Checked In</b> list for the Normal view and Bulk view. See <a href="#">Setting Up the Check In Workform</a> .	All values selected
Check-in: Prompt for in-transit in bulk mode	System, Library, Branch	Applies to bulk check-in. Items assigned to another branch are automatically given a status of In-transit when checked in. This parameter specifies if a message notifies the user of the In-transit status when an item is checked in at a branch other than the assigned branch.	No - No message is displayed.
Check-in: Prompt for in-transit in	System, Library	Applies to normal check-in. Specifies if a prompt appears when an item is checked in at a branch	No - Items assigned to another branch are automatically given a status

Parameter	Org Level	Description	Default Setting
normal mode	ry, Branch	other than the assigned branch. The prompt offers the choice of changing the item's status to In-transit to its assigned branch, or changing the item's status to In.	of In-transit when checked in
Check-in: Receipt options	System, Library, Branch	Specifies which fields appear on the check-in receipt. See <a href="#">Setting Up Circulation Receipts</a> .	Item barcode, title, author, material type, call number, and patron's limited barcode
Check-out: Charge options	System, Library, Branch	Sets policies for charging for check-out and/or renewal. See <a href="#">Charging for Checkout and Renewal</a> .	No charges enabled
Check-out: Increase Total Item Limit	Branch	Defines the number of items an enabled patron can check out in addition to the total item limit defined in the <a href="#">Patron/Material Type Loan Limit Blocks policy table</a> .  See "Increasing Check-out Limits by Branch" in the Leap help for more information about this feature.	0
Check-out: Listview options	System, Library, Branch	Specifies which optional item information columns appear on the Check Out workform. See <a href="#">Setting Up the Check Out Workform</a> .	All values selected

Parameter	Org Level	Description	Default Setting
	ch		
Check-out: Optional patron data	System, Library, Branch	Specifies which optional patron data fields appear on the Check Out and Patron Status workform. See <a href="#">Setting Up the Check Out Workform</a> .	—
Check-out: Receipt options	System, Library, Branch	Specifies which optional fields appear on the check-out receipt. Also specifies if receipts are printed after a prompt and whether Leap checkouts prompt for eReceipt options for patrons who do not receive eReceipts. See <a href="#">Setting Up Circulation Receipts</a> .	<b>Library phone, library Web address</b>
Check-out: Require format selection when checking out integrated eContent	System, Library, and Branch	Specifies whether patrons are required to select the format when checking out integrated eContent titles in the PowerPAC and Mobile PAC.	No If set to <b>Yes</b> for the organization, patrons must select the format when checking out integrated eContent titles from the PowerPAC or Mobile PAC.
Check-out: warn if item is from another branch	System, Library, Branch	Determines whether this message is displayed when you attempt to check out an item that belongs to another branch: <b>This item is assigned to 'Branch X.' Do you want to continue with this transaction?</b>	No



Parameter	Org Level	Description	Default Setting
Check-out: warn to send item in-transit	System, Library, Branch	Applicable when the parameter <b>Check-out: warn if item is from another branch</b> is set to <b>Yes</b> and the staff member chooses <b>No</b> (do not continue with the check-out transaction). Determines whether this subsequent message is displayed: <b>Do you want to put this item in transit to 'Branch X?'</b>	Yes
Claims: Number patron can have at one time	System, Library, Branch	If a patron claims that she never had an item or that she returned an item, and a claim is added to her record, this setting determines how many claims she can have before Polaris blocks her account. These include only the claims still on the patron's record, not items that have been recovered.	10
Claims: Total number allowed	System, Library, Branch	Specifies the maximum number of resolved and unresolved claims a patron is allowed. If a patron accumulates the maximum number of claims, Polaris blocks the patron from borrowing any more items. Maximum claims include current claims and all the old claimed items that have since been found.	Value from parent organization setting
Collection agency options	System, Library, Branch	Defines the conditions and methods for sending delinquent account information to a collection agency. Double-click <b>Collection agency option</b> to display the	—

Parameter	Org Level	Description	Default Setting
	ch	Collection Agency Setup dialog box. See <a href="#">Using a Collection Agency</a> .	
Consortium circulation	System	Specifies the governing library (transacting branch, item's assigned branch, patron's branch) to use for due date calculation, loan and request limits, fine calculation, and lost item recovery. Double-click <b>Consortium circulation</b> to display the Consortium Circulation dialog box. See <a href="#">Governing Library for Circulation Transactions</a> .	—
Course reserve options	System, Library, Branch	Defines the default settings for the reserve item "record," which stores circulation, status, and disposition information about an item that has been placed on course reserve. Double-click <b>Course reserve options</b> to display the Course Reserve dialog box. See <a href="#">Setting Up Course Reserves</a> .	—
Credit for overpayment	System, Library, Branch	Specifies whether an overpayment on a patron account can be applied to the account as a credit. See <a href="#">Setting Patron Accounting Options</a> .	No
Days not fineable	System, Library	Identifies the days of the week for which fines are not charged on an overdue item. For example, a	None

Parameter	Org Level	Description	Default Setting
	ry, Branch	<p>library decides to designate Sunday as a “day not fineable” because the library is closed. If an item is due on Saturday and returned on Monday, fines are not charged for Sunday.</p> <p>To select days for which overdue fines are not charged, double-click <b>Days not fineable</b> to display the No Fine Day(s) dialog box. Then select the checkbox for each day to be omitted for overdue fines, and select <b>OK</b>.</p>	
Distributed waives	Syst em, Libra ry, Branch	Specifies whether a specific amount can be deducted from <i>each</i> of several selected charges on a patron’s account. See <a href="#">Setting Patron Accounting Options</a> .	No
Due date truncated: Prompt	Syst em, Libra ry, Branch	Specifies whether a message is displayed at circulation when a due date is changed automatically according to the number of hold requests for an item (see Defining Hold Processing Options), or for an end-of term due date setting (see <a href="#">Setting End-of-Term Due Dates</a> ).	No
Duplication detection options	Syst em, Libra ry, Branch	Specifies which, if any, additional patron record fields are checked for matching criteria during patron duplicate detection. Double-click <b>Duplicate detection options</b> to	No values selected

Parameter	Org Level	Description	Default Setting
		display the Duplicate detection options dialog box. See <a href="#">Setting Patron Duplicate Detection</a> .	
End-of-term due date options	System, Library, Branch	Specifies one or more due dates for items. This feature allows libraries to prevent the circulation of items after a certain date, such as the end of a school term. After the date has passed, items can circulate again. Double-click <b>End-of-term due date options</b> to display the End-of-term due date options dialog box. See <a href="#">Setting End-of-Term Due Dates</a> .	—
EReceipt options	System, Library, Branch	Enables eReceipts (e-mail and/or text message receipts) so that patrons can receive these instead of printed check-out, renewal, and fine receipts. See <a href="#">Setting Up eReceipts</a> .	Not enabled; no values selected
Express patron registration options	System, Library, Branch	Specifies the values that automatically appear in fields on the Express Registration workflow upon express patron record creation. Double-click <b>Express patron registration options</b> to display the Express patron registration options dialog box. See <a href="#">Setting Express Registration Defaults and Requirements</a> .	—
Fine and loan period	System,	Specifies default fine and loan period values to use when a new	—

Parameter	Org Level	Description	Default Setting
defaults	Library, Branch	fine or loan period code is created. See <a href="#">Setting Up Course Reserves</a> and <a href="#">Set SIP self-check parameters</a> .	
Fine receipt options	System, Library, Branch	Specifies which optional fields appear on the fine receipt, and whether a receipt is printed for waived charges. See <a href="#">Setting Up Circulation Receipts</a> .	Library phone, library Web address, Suppress for waived charges
Fine receipts: Print duplicate receipt	System, Library, Branch	If fine receipts are printed, this setting specifies whether duplicate fine receipts are also printed, which may be required by library policy. See <a href="#">Set fine receipt options</a> .	No
Floating options	System, Library, Branch	Specifies whether floating collections processing is enabled. At the System level, specifies limits on items that can float by collection or title/material type. Search Polaris help for "Setting Up Floating Collections."	Floating not enabled.
Free days (bulk)	System, Library, Branch	Identifies the default number of days omitted from overdue fine calculations at bulk check-in and when uploading offline transaction files (Bookmobile workform). This setting also determines free days for check-in and renewal from the Patron Status workform - Items out view, the item record, Find Tool,	0 days

Parameter	Org Level	Description	Default Setting
		and during check-out when an item already checked out to one patron is checked out to another. See <a href="#">Calculating Overdue Fines</a> .	
Free days (normal)	System, Library, Branch	Identifies the default number of days omitted from overdue fine calculations at normal check-in. Free days are used to cover unexpected closings when books might be checked in late, and the library does not want to charge overdues for the unexpected down time. See <a href="#">Calculating Overdue Fines</a> .	0 days
Hold slip options	System, Library, Branch	Specifies which optional fields appear on the hold slip. See <a href="#">Setting Up Circulation Receipts</a> .	Patron name, Limited patron barcode, Print patron phone, Patron address
Holds call slip: enable	System, Library, Branch	Specifies whether a specially formatted hold call slip is available. This slip includes extended information, and can be folded to conceal patron information. See <a href="#">Setting Up Circulation Receipts</a> .	No
Holds pickup slip options	System, Library, Branch	Specifies whether a specially formatted hold pickup slip is available. This slip is formatted for libraries that let patrons pick up their own held items. Specifies which optional fields appear on the	Not enabled

Parameter	Org Level	Description	Default Setting
		hold pickup slip and the number of blank lines to place at the right side of the hold pickup slip. See <a href="#">Setting Up Circulation Receipts</a> .	
Hours of operation	System, Library, Branch	Identifies the days closed and hours opened for the organization. Double-click <b>Hours of operation</b> to display the Hours of Operation dialog box. You can also make these settings on the branch workform (select <b>Tools, Define Hours of Operation</b> ). To set specific dates closed, such as January 1, 2010, search Polaris help for "Identifying Dates Closed."	No values
In-transit slip options	System, Library, Branch	Specifies whether a requesting patron's name is printed on the in-transit slip, whether the destination branch's full name or an abbreviation is printed, and whether the in-transit and pickup slips are to be combined. See <a href="#">Setting Up Circulation Receipts</a> .	Patron's name - Yes; Branch full name
Items out receipt options	System, Library, Branch	Specifies the optional information to include on the printed Items Out list, available from the Patron Status workform - Items Out view. See <a href="#">Set Items Out receipt options</a> .	—
Last use patron display	System, Library	Specifies whether the link to the previous borrower's record is available, and whether the patron's	Yes - The Item Record workform - Circulation view offers a link to the last

Parameter	Org Level	Description	Default Setting
	ry, Branch	barcode is displayed, on the Item Record workform - Circulation view. Privacy policies at the library may restrict displaying who had an item after the item is returned.	borrower's record, and the patron's barcode is displayed.
Last use patron: Delete	System, Library, Branch	Determines if the previous borrower's information is kept on item records.	Yes
Last use patron: Number of days to keep	System, Library, Branch	Sets the number of days the previous borrower's information is kept on item records.	0
Lost item charge options	System, Library, Branch	Specifies whether an item's status is changed to lost when the item is billed for overdue fines (system level only); whether overdue fines are charged to the patron's account if you set billed items to be declared lost automatically; whether overdue fines are charged to the patron's account when an item is declared lost; or whether overdue fines are instead calculated when a lost item is returned. Search Polaris help for "Overdue Fines on Lost Items."	—
Lost item	System	Specifies the automatic actions to	—



Parameter	Org Level	Description	Default Setting
recovery	em, Library, Branch	take when lost items are recovered at check-out, normal check-in, and bulk check-in. Certain settings also apply to offline circulation and Polaris ExpressCheck. When you set automatic default processing options, staff do not need to resolve lost items manually when they are recovered at circulation. Search Polaris help for "Setting Lost Item Recovery Defaults."	
Lost item transition	System, Library, Branch	Updates the circulation status of Lost items to either Missing or Withdrawn based on the amount of time they have been lost. See <a href="#">Set up lost item transition to missing or withdrawn.</a>	—
Material type groups	System	Specifies groups of material types and sets check-out limits on a selected groups for specified patron codes. Search Polaris help for "Defining Material Type Group Limits."	—
Missing item transition	System	Updates the circulation status of Missing items to a status of Withdrawn after a specified period of time. See <a href="#">Set up missing item transition to withdrawn.</a>	—
Offline (Automated): Client workstation		Specifies whether to continue or stop the automatic offline process if an error is encountered when pulling transactions from a	Yes

Parameter	Org Level	Description	Default Setting
ns: Continue on error		workstation. If this parameter is set to Yes, the process continues even if an error is encountered, such as the workstation is offline or the .TRN path is invalid, and the job cannot pick up the .TRN files.	
Offline (Automated): Directory where offline TRN files are stored	System	Specifies the directory where the offline TRN files are gathered and stored on the client workstation.	C:\ProgramData\Polaris\5.0\OfflineTransaction  Note: If your library chooses to use a network share, enter the path in this parameter. For example, \\server\share
Offline (Automated): Enable automatic offline uploading	System	When set to <b>Yes</b> , this parameter enables automatic offline processing for all branches in the library system. See <a href="#">Setting Patron Duplicate Detection</a> .	No
Offline (Automated): Generate one upload log per branch - This parameter, set at the System level only, is	System	Specifies whether one or multiple log reports are created. If the value is set to <b>Yes</b> , one upload log is generated per offline branch. If this parameter is set to <b>No</b> , a single log file is generated for all offline branches. Log files are saved to: \\SERVER\c\$\ProgramData\Polaris\<version>\Logs\Offline	Yes

Parameter	Org Level	Description	Default Setting
Offline (Automated): Polaris user for automatic upload process	System	Specifies the user assigned during the automatic upload processing. To specify a user, choose the user from the drop-down list of usernames.	PolarisSuperUser
Offline (Automated): Send offline upload log report to email address	System, Library, Branch	Specifies the email addresses of users who receive the log reports. (If the job runs and no email address has been entered at the branch, library, or system level, the logs will still be produced, but they will not be emailed.) You can enter one or multiple email addresses, not to exceed 255 characters total. If multiple email addresses are entered, they must be separated by semicolons.	None defined
Offline: Include patron account balance		Determines whether the patron account balance is included in the offline MDB files. (It does not affect offline circulation operations.	—
Offline: trap holds at check-in	System, Library, Branch	Determines whether eligible items are trapped for holds when an offline file with check-in transactions is uploaded. See <a href="#">Setting Up Offline Circulation for Manual Uploading</a> , "Holds Processing at Upload".	Yes
ORS	System	Specifies header and rating line	None defined

Parameter	Org Level	Description	Default Setting
packing list	em, Library, Branch	text for outreach services packing lists where reader ratings are enabled. See <a href="#">Setting Up Reader Ratings</a> .	
ORS reading history	System, Library, Branch	Specifies the length of time a title is kept in an Outreach Services patron's reading history, and the maximum number of titles the history can contain. See <a href="#">Setting Up Outreach Services</a> .	3 years, 1,000 titles
ORS automatically print packing list	System, Library, Branch	Determines whether the packing list is automatically printed when items are checked out for outreach services patrons. See <a href="#">Setting Up Reader Ratings</a> .	No
ORS: Include other library items in selection list processing	System, Library, Branch	Used in outreach services processing. When this parameter is set to <b>Yes</b> , items belonging to the libraries in the ORS: Included Branches policy table are candidates for selection list processing when staff members choose <b>Default branches</b> to select items. The staff member can also choose <b>Any</b> to include items from any branch in the system. When the parameter is set to <b>No</b> , the table is ignored and the <b>Default branches</b> and <b>Any</b> options are not available. Only items belonging to the logged-in branch are selection	—

Parameter	Org Level	Description	Default Setting
		list candidates. For more information about setting the ORS: Included Branches policy table, see <a href="#">Set branch items to include in outreach selection lists</a> . For more information about all Polaris Administration settings that affect outreach services processing, see <a href="#">Setting Up Outreach Services</a> .	
ORS: Prompt for update during normal check-out	System, Library, Branch	Displays a prompt to update the next service date for an active ORS patron during normal check out.	Yes
Outreach title rating	System	Specifies a rating scale for outreach services patrons if you choose to enable reader ratings. Outreach services patrons return their ratings with their items, and staff members enter the ratings in the patron account. See <a href="#">Set up reader ratings</a> .	—
Outreach title rating enabled	System, Library, Branch	Determines whether reader ratings for titles can be added to an outreach services patron record (Patron Status workform -Reader Services view). See <a href="#">Setting Up Reader Ratings</a> .	No - Reader ratings cannot be added to patron record.
Overdues: # of days until long	System, Library	Specifies the number of days to count from the day the item becomes overdue until the item	0 (zero) - Suppresses the long-overdue status and any related long-overdue

Parameter	Org Level	Description	Default Setting
overdue	ry, Branch	becomes "long overdue." Polaris uses the threshold to increment the long overdue counter.	processing.
Overdues: Add closed days/dates to grace days	Syst em	Specifies whether to include closed days and dates in your system's grace period calculations. See <a href="#">Grace Periods</a> .	No
Overdues: Block for long overdue items	Syst em, Library, Branch	Specifies whether a check-out is interrupted if the patron has any borrowed items with the long overdue status. The time interval that makes an item long overdue is specified by the <b>Overdues: # of days until long overdue</b> parameter	Yes - A message interrupts check-out when the patron barcode is entered if the patron has long overdue items.
Overdues: Charge fines for claimed items	Syst em	Specifies whether an overdue fine is charged if an item with the status Claim Returned or Claim Never Had is checked in or checked out.	Yes - Overdue fines are charged on overdue claimed items that are checked in or checked out.
Overdues: Charge fines for dates closed	Syst em	Specifies whether Polaris charges overdue fines on closed dates.  Note: Closed dates are configured in the Dates Closed policy table. See Dates Closed Policy Table. For more information about how Polaris calculates overdue fines, see Calculating Overdue Fines.	No
Overdues: Clear fine if recovered	Syst em	Specifies whether an overdue fine is automatically waived if the item is "recovered" during a check-out.	No - The fine remains in a patron's account history for the overdue item.

Parameter	Org Level	Description	Default Setting
at check-out (System)			
Overdues: Clear fine if recovered at renewal	System	Specifies whether an overdue fine is waived automatically for an overdue item if the patron is renewing the item.	No - The fine remains in a patron's account history for the overdue item.  If set to Yes, the fine is waived automatically if the patron renews the overdue item.
Overdues: Maximum overdue fine balance	System	If a dollar amount above \$0.00 is set, the overdue fine balance in all patron accounts cannot exceed this amount.  See <a href="#">Circulation Permissions Reference</a> .	\$0.00 - By default, the maximum overdue fine limit is not set, and the amount displays as \$0.00.
Overnight loan period	System, Library, Branch	Indicates that the library automatically permits overnight loans for hourly loans (less than 24 hours) due after the library's closing time. Double-click <b>Overnight loan period</b> to display the Overnight Loan Period dialog box. To permit automatic overnight loans, select the <b>Allow automatic overnight loan</b> checkbox. To make overnight loans due later than the library's opening time, input hours or minutes in the time period boxes ( <b>Time after opening when item is due</b> ). Select <b>OK</b> to submit your settings. See <a href="#">Hourly Loans</a> .	Selected, with one hour of additional time.

Parameter	Org Level	Description	Default Setting
Patron Account: Charge Alert Threshold	Syst em, Libra ry, Bran ch	Defines the charge alert threshold value. The system displays a warning message if a staff member adds a charge to a patron account that exceeds the charge alert threshold.	\$999.00
Patron delete options	Syst em, Libra ry, Bran ch	Defines whether and how Polaris automatically deletes patron records in batch processing. With this parameter, you also set the thresholds for exceptional conditions to block patron record deletion. Double-click <b>Patron delete options</b> to display the Patron delete options dialog box. See <a href="#">Setting Options for Deleting Patron Records</a> .	—
Patron message text: Configure	Syst em, Libra ry, Bran ch	Defines available messages for posting to specific patron records and provides the ability to translate the messages into languages licensed for Polaris PowerPAC. See <a href="#">Setting Up Patron Messages</a> .	—
Patron message text: Expiration period	Syst em, Libra ry, Bran ch	Sets the standard posting period (1-99 days) for messages that have been posted to specific patron records. See <a href="#">Setting Up Patron Messages</a> .	14 days
Patron Registratio n: Filter	Syst em, Libra	Allows you to manage gender drop down lists.	—



Parameter	Org Level	Description	Default Setting
genders	ry, Branch		
Patron registration: Filter patron codes	System, Library, Branch	Specifies which patron codes, as defined in the Patron Codes policy table, are available for selection in the organization's workforms. See <a href="#">Defining Patron Codes</a> .	All selected
Patron registration: First name required	System, Library, Branch	Determines whether the first name is required to save a patron record. See <a href="#">Setting Patron Registration Required Fields and Defaults</a> .	Yes
Patron registration options	System, Library, Branch	Specifies the values, if any, that automatically appear in fields on the Patron Registration workform upon patron record creation. Double-click to display the Patron registration options dialog box. See <a href="#">Setting Patron Registration Required Fields and Defaults</a> .	—
Quick-circ: material type	System, Library, Branch	Specifies the default material type setting for new quick-circ item records. See <a href="#">Circulating Ephemeral Items</a> .	—
Reading history	System, Libra	Identifies how patron reading histories are maintained in Polaris. Double-click to display the Reading	—

Parameter	Org Level	Description	Default Setting
	ry, Branch	History Setup dialog box. See <a href="#">Setting Reading History Options</a> . Applies to Leap. If the <b>Enable reading history</b> box is selected, in the Reading History Setup dialog box, the <b>Reading History</b> link appears in the <b>More</b> menu on the Patron Registration workform in Leap. If the checkbox is not selected, the link does not appear.	
Registration fee options	System, Library, Branch	Specifies the registration fees, if any, for specific patron codes. The fee is applied automatically at the time of registration or renewal, and the patron account is blocked until the charge is paid.  Double-click to display the Registration Fee Options dialog box. See <a href="#">Charging for Patron Registration</a> .	—
Remove patron ID from circulation transactions	System, Library, Branch	Purges patron identification information from transaction records and item record histories after a specified time period. See <a href="#">Removing Patron ID Information from Transaction Files</a> .	—
Renewal: Auto renew	System, Library,	Specifies whether automatic renewals are performed. Automatic renewals are completed as part of the Notices Processing	No

Parameter	Org Level	Description	Default Setting
	Branch	SQL job. When the job runs, it automatically renews eligible items for which the item's assigned branch has the <b>Renewal: Auto-renew</b> parameter set to <b>Yes</b> . A patron's items will be auto-renewed based on the number of days specified in the <b>Notice options, Reminders</b> setting for the patron's registered branch. See <a href="#">Automatic Renewal Process</a> .	
Renewal: Block if there are holds	System	Displays a block message when a renewal attempt is made on an item that is out and there are requests for the title. Staff with the required permissions can renew the item, or the renewal can be canceled.  When set to <b>Yes</b> , the block message is always displayed when there are requests for the title. When set to <b>No</b> , the block message is displayed only when the item being renewed is the only item available to fill the request. If other holdable and potentially eligible items are In, no dialog box appears and the item can be renewed. See <a href="#">Allow renewals for items with hold requests</a> .	Yes
Renewal: Calculate	System	Determines how Polaris calculates due dates for renewals.	No

Parameter	Org Level	Description	Default Setting
based on due date		<p>When set to <b>No</b>, the system calculates the due date for renewals by adding the loan period to today's date. When set to <b>Yes</b>, the system calculates the due date by adding the loan period to the due date.</p> <p>Note: This parameter does not apply to automatic renewals. Due dates for auto-renewals are calculated by adding the loan period to the due date. For information about auto-renewals, see <a href="#">Automatic Renewal Process</a>.</p>	
Replacement fee options	System, Library, Branch	<p>Defines how the replacement cost and processing fees are calculated for each material type when a patron is charged for replacing a lost or damaged item.</p> <p>Double-click to display the Replacement Fee Defaults dialog box. See <a href="#">Setting Replacement Fee Defaults</a>.</p>	—
Shelving status options	System, library, branch	<p>When an item is returned to its assigned branch and checked in, the item's circulation status becomes In even though the item may not be immediately returned to the shelf. Use this parameter to enable a shelving status description and, for each material type, set a period of time during</p>	—

Parameter	Org Level	Description	Default Setting
		which the checked-in item's In status is displayed as Shelving (or another appropriate description). See <a href="#">Setting Shelving Status</a> .	
Standard loan period	System, Library, Branch	Defines the loan period that the system, library, or branch uses during offline circulation, when there is no access to the database to determine the loan period.	21 days
Undefined fine amount	System	Defines the fine amount that the system uses when the fine cannot be determined, perhaps because a patron code has not been defined. This value is also used to automatically populate the tables if a new branch or patron code is added.	\$5.00
Undefined loan period	System	Defines the loan period that the system uses when the loan period cannot be determined, perhaps because a patron or item code has not been defined. Polaris displays a message at check-out if the undefined loan period is being used. Staff members can use the undefined loan period or set a loan period manually, using the Special Loan Period dialog box. This value is also used to automatically populate the appropriate tables if a new branch or patron code is added.	14 days

Parameter	Org Level	Description	Default Setting
Waive All displays	System, Library, Branch	Determines whether the Waive All icon and shortcut key are available for use from the Patron Status workflow - Account view. See <a href="#">Setting Patron Accounting Options</a> .	Yes
WAM Block if Patron has stops	System, Library, Branch	For libraries that use Wireless Access Manager (WAM) software. Determines whether patrons whose accounts are blocked can use wireless access. When you set this parameter to <b>Yes</b> at the branch level, it applies to patrons registered at that branch no matter where the blocked patron tries to use wireless access. That is, even if the blocked patron tries to use wireless access at a branch that sets this parameter to <b>No</b> , the patron cannot use wireless access at that branch.	Yes
You Saved Receipt Options	System, Library, Branch (some options available)	Adds a “you saved” message on print and email check out receipts. You can set the options to include the message on printed and e-mail receipts and items out slips at the System, Library, or Branch level. The options to use the default replacement fee when price is unavailable, and include renewals in the total value can be set at the System level only. See <a href="#">You Saved Receipt Messages</a> .	—

Parameter	Org Level	Description	Default Setting
	at System level only)		

## Notification Parameters Reference

These parameters are available on the **Parameters > Notification** tabbed page on the Administration Explorer at the listed organizational levels.

Parameter	Org Levels	Description	Default
Active default notification delivery option	<ul style="list-style-type: none"> <li>System</li> </ul>	Identifies the default delivery method for notices, if not specified in the patron record. This parameter affects only the notice queue, not the patron record itself.	Mailing Address
Email notification: Email address of sender	<ul style="list-style-type: none"> <li>System</li> <li>Library</li> <li>Branch</li> </ul>	Specifies a standard sender address for email services from the public interfaces, such as emailing a title list. Most email applications require a standard sender address. This address is also used for online payment receipts, telephony service error and warning messages, and the EDI email log.	youremail@yourdomain.com



Parameter	Org Levels	Description	Default
		<p>The email address you enter must contain the @ symbol.</p>	
<p>Email server: SMTP address</p>	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	<p>Specifies the Simple Mail Transfer Protocol (SMTP) server to use for PAC email features such as Ask Us or purchase requests from rotating book jacket titles. If each branch has its own SMTP server, you can route patron email messages from public stations through that server. This setting is also used for telephony service error and warning messages, and for email notification.</p> <p>Type the domain name of the email SMTP server.</p>	<p>smtp-relay.yourdomain.com</p>

Parameter	Org Levels	Description	Default
Email server: SMTP port	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Specifies the port number of the email SMTP server.	25
Email server: Use SSL/TLS	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Specifies if the email SMTP server uses Secure Socket Layer (SSL) or Transport Layer Security (TLS) encryption.	No
Email server: Use authentication	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Specifies if the email SMTP server uses a username and password for additional data security.	No
Email server authentication: Username	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Specifies the username for the email SMTP server.  If you set Email server: Use authentication to No, leave this value blank.	—
Email server authentication: Password	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Specifies the password for the email SMTP server.  If you set Email	—

Parameter	Org Levels	Description	Default
		server: Use authentication to No, leave this value blank.	
Notice history: hold notices time threshold	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	<p>Controls how long pick-up and canceled hold notices are kept in the patron's notice history. The default setting is 90 days; the maximum value is 9,999 days. See <a href="#">The Notification History</a> for detailed information.</p>	Yes
Notice history: item and account notices time threshold	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	<p>Controls how long overdue, fine, bill, and reminder notices are kept in the notice history. The default setting is 90 days; the maximum value is 9,999 days. See <a href="#">The Notification History</a> for detailed</p>	Yes

Parameter	Org Levels	Description	Default
Notification options	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	information.  Identifies the notice types, languages, and notification delivery methods that organizations use, as well as settings for overdue, hold request, and e-mail reminder notices. See <a href="#">Delivering Notices by Phone (Outbound Telephony)</a> for detailed information.	Yes

## Request Parameters Reference

These parameters are available on the **Parameters, Request** tabbed page on the Administration Explorer, at the listed organizational levels.

**Note:**

If your library has a license for INN-Reach integration with Polaris, three additional parameters are available for managing INN-Reach. See the Polaris Online Help, Set INN-Reach request parameters in Polaris Administration topic.

Parameter	Org Level	Description
Borrow by mail	Designate processing centers at the System level. Other settings are available at the System, Library, and Branch levels.	These settings control Polaris Borrow by Mail, a licensed feature. Search Polaris help for "Define Borrow by Mail parameters."
Holds options	Some options can be set at the System level only.	These settings control holds processing in Polaris. See <a href="#">Holds Processing Overview</a> .
Holds: Enable asynchronous RTF threshold	System	This is beta functionality. This setting determines if Polaris performs real-time RTF processing on titles with a high-volume of hold requests. Continue on the default setting of No if your library wants all hold requests to use real-time RTF processing.  If your library is having performance issues with titles that have a high

Parameter	Org Level	Description
		volume of holds, then setting this option to Yes moves the RTF processing on high-volume holds to a background job.
ILL options	<p>You can set most ILL options at the System, Library, or Branch level.</p> <p>Applies to Leap.</p> <p>If either or both of the <b>Enable</b> checkboxes are checked (PAC requests or Staff requests), the ILL option appears in the More menu in Leap. If both Enable checkboxes are not checked, the ILL option does not appear in the menu.</p>	<p>These settings control ILL processing in Polaris. See <a href="#">Setting Up ILL Requests</a>.</p>
ILL: Computer designated for sending OCLC/ILL direct requests	System	<p>The Polaris Application Server handles ILL direct requests to OCLC. Your existing application server is the default entry. If your application server name changes, enter the new Polaris Application Server name in this parameter. See <a href="#">Setting Up ILL Requests</a>.</p>
NCIP: Use unlocked hold requests	System	In NCIP processing, the hold request is created in

Parameter	Org Level	Description
		<p>response to the ItemRequested message used by ILL. This is early in the ILL process, and the hold request cannot be canceled or modified in Polaris. Some library systems may prefer to prevent the immediate creation of the hold request. Search the Polaris help for "Prevent creation of holds in response to ILL message."</p>
<p>Web App: Enable combined picklist view</p>	<p>System, Library, and Branch</p>	<p>This setting determines if Leap displays all holds in one combined list or keeps them in 3 separate lists. See "Picklist Workform" in the Leap help.</p>
<p>Web App: Use patron's preferred branch for multiple holds from record set</p>	<p>System, Library, and Branch</p>	<p>This setting determines if the Patron's Preferred Location option appears in the Pickup list when you request a single title for multiple patrons in Leap. See "Request the Same Title for Multiple Patrons" in the Leap help.</p>

## Credit Card Payment Parameters Reference

These parameters are available on the **Parameters, Credit Card Payment** tabbed page on the Administration Explorer, at the listed organizational levels.

Exclude local workstations from web based payments (System)

When set to **Yes**, supports a lower level of PCI compliance on the library's part by preventing payments through PayPal's Payflow Pro or hosted gateway solutions such as Payflow Link, Payments Gateway, or Comprise SmartPay from within the library network. "Local workstations" are those defined in the In-House IP Addresses database table.

- Default: No

Online Payments: Configure  
(System, Library, Branch)

Use this parameter to set up credit card processing in the staff client, PAC, and Polaris ExpressCheck. Double-click to display the Online Payment Settings dialog box. You need specific values from your e-commerce provider to configure online payments. See [Setting Up E-Commerce](#).

Payment Terminal ID  
(Workstation)

For Comprise SmartPAY users. Use this parameter to specify the SmartTerminal card reader ID. You must set this parameter for each staff client and ExpressCheck workstation with a SmartTerminal reader. See [E-Commerce with Comprise™ SmartPAY™](#).



## Self-Check Parameters Reference

These parameters are available on the **Parameters > SelfCheck Unit** tabbed page on the Administration Explorer, at organization level indicated. See also: [Setting Up SIP Self-Check Circulation](#)

**Note:**

The Polaris ExpressCheck parameters apply only to Polaris ExpressCheck self-check units.

Parameter	Org Level	Description	Default Setting
Polaris ExpressCheck: Options	System Library Branch	Set options to activate Polaris ExpressCheck, require a patron password, display an on-screen keypad, display the holds queue position, display a warning message for expiring patron accounts, permit registration renewal at the Polaris ExpressCheck unit, print receipts for individual items, allow access to patron accounts, enable eReceipts, and other options. You can also set the time-out period. If you use ITG DiscXpress II dispenser units, you can choose to display an on-screen acknowledgment message when a dispenser item is checked out. Search the Polaris help for "Enable media dispenser processing."	
Polaris SelfCheck: Blocking	System Library	Displays the Polaris SelfCheck Blocking Conditions dialog box, where you set the conditions	

Parameter	Org Level	Description	Default Setting
Conditions	Branch	related to patron records and item records that should block circulation at the Polaris ExpressCheck unit or in Polaris API.	
Media dispenser settings	System Library Branch	Enable Polaris to work with the media dispenser, and specify material types and messages.	
Allow SIP processing	System Library Branch	Enables self-check to run.	Yes
Assigned staff member	System Library Branch	The library staff member who is assigned the circulation transaction.	PolarisExec
SIP default workstation	System Library Branch	The workstation ID used for self-check transactions.	
SIP login password	System Library Branch	The password for logging in to self-check.	3MLogin
SIP login user ID	System Library Branch	The username for logging in to self-check.	3MLogin
SIP uses patron passwords	System Library Branch	Enables self-check to require passwords for patrons to use self-check.	No

Parameter	Org Level	Description	Default Setting
Default security marker	System Library Branch	Type of security marker on the items.	
Patron Blocks	System Library Branch	Options for respecting or ignoring blocks on patron records: free-text blocks; library-assigned blocks; associated patron blocks; collection agency blocks; blocking notes; setting for maximum claims allowed.	Various
Retries allowed	System Library Branch	Number of times the self-check unit attempts to resend a message to the client machine. This applies when there are network problems or if the client software goes offline.	3
Time-out period 000 (none)- 999 (not known)	System Library Branch	Number of seconds (in tenths of a second) that the self-check unit pauses before retrying or canceling a transaction that does not receive a response from the client software.	300 tenths of a second (30 seconds)
Allow check-outs during renewal	System Library Branch	Permits a library item that is already checked out to one person, according to the system, to be checked out to another person.	Yes
Check-ins ok	System Library Branch	Permits library items to be checked in.	Yes

Parameter	Org Level	Description	Default Setting
Check-outs ok	System Library Branch	Permits library items to be checked out.	Yes
Check-out: Append you saved message to Checkout Printer message	System Library Branch	Adds You Saved message to printed check-out receipts. See <a href="#">Set SIP self-check parameters</a> .	No
Check-out: Append you saved message to Checkout Screen message	System Library Branch	Adds You Saved message to check-out screen messages. See <a href="#">Set SIP self-check parameters</a> .	No
Check-out: Charge options	System Library Branch	If the organization has set charge policies for checkout or renewal, this parameter determines whether chargeable items can be checked out or renewed at the SIP self-check workstation.	
Deny check-out if item is from another branch	System Library Branch	Determines whether an item can be checked out if it belongs to another branch.  Set to No if an item assigned to another branch can be checked out using this self-check unit.	No
Holds ok	System Library Branch	Permits hold requests to be placed on items.	No

Parameter	Org Level	Description	Default Setting
Offline ok	System Library Branch	Set this to <b>No</b> because currently, you cannot use SIP self-check offline.	No
Renewals ok	System Library Branch	Permits an item to be renewed.	No
Use error correction	System Library Branch	Permits a checksum and sequence number at the end of every message sent to and from the software.	Yes
Status update ok (can block a patron, etc.)	System Library Branch	Permits a patron's status to be updated. Allows a self-check unit equipped to detect suspicious behavior (such as swapping items in a stack) to apply a block to a patron record.	Yes
System supports the block patron message	System Library Branch	Displays a message when a patron is blocked from checking out material. The message may appear if a patron left his card in the SelfCheck machine or was tampering with the machine.	Yes
System supports the check-in message	System Library Branch	Displays a message to check in material.	Yes
System supports the check-out message	System Library Branch	Displays a message to check out material.	Yes

Parameter	Org Level	Description	Default Setting
System supports the end session message	System Library Branch	Displays a message to end the session.	No
System supports the fee paid message	System Library Branch	Displays a message to pay a fee to the patron's account.	No
System supports the hold message	System Library Branch	Displays a message to put an item on hold.	No
System supports the item info message	System Library Branch	Displays a message with item information.	No
System supports the item status message	System Library Branch	Displays a message with an item's status.	No
System supports the login message	System Library Branch	Displays a message for a user to log on to self-check.	Yes
System supports the patron enable message	System Library Branch	Displays a message for a patron to access self-check.	Yes
System supports the patron info message	System Library Branch	Displays a message with patron information.	No

Parameter	Org Level	Description	Default Setting
System supports the Patron status message	System Library Branch	Displays a message with the patron status.	Yes
System supports the renew all message	System Library Branch	Displays a message to renew all items checked out to a patron.	No
System supports the renew message	System Library Branch	Displays a message to renew an item.	No
System supports the request resend message	System Library Branch	Displays a message to resend a request.	Yes
System supports the system status message	System Library Branch	Displays a message with the system's status.	Yes
Allow checkout of items with free text blocks	System Library Branch	Specifies whether items with free-text blocks to be checked out	Yes
Allow checkout of items with library assigned blocks	System Library Branch	Specifies whether items with library-assigned blocks can be checked out.	Yes
Check-in: Claim Never Had, allow checkin	System Library Branch	Specifies whether an item with a status of Claim Never Had can be checked in at the self-check unit.	No

Parameter	Org Level	Description	Default Setting
Check-in: Claim Returned, allow checkin	System Library Branch	Specifies whether an item with a status of Claim Returned can be checked in at the self-check unit.	No
Check-in: Item blocks, allow checkin	System Library Branch	Specifies whether an item with blocks (library-assigned blocks, free text blocks, or system blocks) can be checked in using the self-check unit or sorter.	Yes
Printer messages	System Library Branch	The messages that appear on receipts. You can modify them to differ from the messages that appear on the screen for the same functions. The Checkin printer message, <i>This item is committed for INN-Reach ILL</i> appears only checking in pending, located, or shipped items requested through INN-Reach.	
Screen messages	System Library Branch	The messages that appear on the screen. You can modify them to differ from the messages that appear on receipts for the same functions. The Checkin screen message, <i>This item is committed for INN-Reach ILL</i> appears only when checking in pending, located, or shipped items requested through INN-Reach.	
SIP2 extensions enabled	System Library	For certain vendors' self-check units, enables specific SIP2	No



Parameter	Org Level	Description	Default Setting
	Branch	functionality.	
Use printer messages	System Library Branch	Enables the printer messages to be printed on receipts.	
Use screen messages	System Library Branch	Enables the screen messages to appear on the screen.	
Allow Security Manager in Terminal Services	Workstation only	Disables or enables RFID at the workstation level when using Polaris in a terminal services environment where Security Manager is running on the terminal server.	

## Glossary

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### 0

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#### **006 field**

Fixed-length Data Elements - Additional Material Characteristics: This field contains 18 character positions (00-17) that provide for coding information about special aspects of the item being cataloged that cannot be coded in field 008 (Fixed-Length Data Elements). It is used in cases when an item has multiple characteristics. It is also used to record the coded serial aspects of nontextual continuing resources. The field has a tree structure, whereby the code given in 006/00 (Form of material) determines the data elements defined for subsequent character positions. Except for code s (Serial/Integrating resource), the codes in field 006/00 correspond to those in Leader/06 (Type of record). For each occurrence of field 006, the codes defined for character positions 01-17 will be the same as those defined in the corresponding field 008, character positions 18-34. Configurations of field 006 are given in the following order: books, computer files/electronic resources, maps, music, continuing resources, visual materials, and mixed materials.

#### **007 field**

Physical Description, Fixed Field - This field contains special information about the physical characteristics in a coded form. The information may represent the whole item or parts of an item such as accompanying material. The data elements in field 007 are positionally defined and the number of character positions in field 007 depends upon the code contained in 007/00. Character position 00 contains a code that identifies the category of material. The fill character (I) is not allowed in this position. The fill character may be used in any other character position when the cataloging agency makes no attempt to code the position. The categories of material for which field 007 is applicable in bibliographic records are presented in the following order in the field description: map, electronic resource, globe, tactile material, projected graphic, microform, non-projected graphic, motion picture, kit, notated music, remote-sensing image, sound recording, text, videorecording, and unspecified.

**008 field**

Fixed-length Data Elements - General Information This field contains 40 character positions (00-39) that provide coded information about the record as a whole and about special bibliographic aspects of the item being cataloged. These coded data elements are potentially useful for retrieval and data management purposes. The data elements are positionally defined. Character positions that are not defined contain a blank (#). All defined character positions must contain a defined code; for some field 008 positions, this may be the fill character (I). The fill character may be used (in certain character positions) when a cataloging organization makes no attempt to code the character position. The fill character is not allowed in field 008 positions 00-05 (Date entered on file). Its use is discouraged in positions 07-10 (Date 1), 15-17 (Place of publication, production, or execution), and the 008 position defined for Form of item (either position 23 or 29 depending upon the 008 configuration). Character positions 00-17 and 35-39 are defined the same across all types of material, with special consideration for position 06. The definition of character positions 18-34 was done independently for each type of material, although certain data elements are defined the same in the specifications for more than one type of material. When similar data elements are defined for inclusion in field 008 for different types of material, they occupy the same field 008 character positions.

**A**

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**added entry**

A secondary entry to the main entry in a MARC record.

**approval plan**

An arrangement with a publisher or vendor to send materials automatically. With an approval plan, it is not necessary for the library to order each title individually, and titles that are not considered appropriate may be returned by the library. An approval plan with a vendor is usually an agreement that the library will receive current imprints selected for the library on the basis of a detailed profile.

**ASN (Advanced Shipping Notice)**

An advance shipping notice or advance ship notice (ASN) is an electronic notification of pending shipments that is provided by a supplier after an EDI order is received and processed. If the supplier has the capability to produce ASNs (X12

transaction set 856), the Polaris EDI Agent utility retrieves the shipment information, and loads the data into Polaris. This enables users to receive materials in Polaris by scanning the tracking barcode on the outside of the carton.

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**B**

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**blanket plan**

A blanket plan (also called a blanket order) is most commonly used for ordering all materials or a specific subset of materials that are published by an organization. In contrast with approval plans, blanket plans do not generally allow return privileges with simple deductions from the invoice. With blanket plans, quality is less important than comprehensiveness of coverage. Blanket plans can be as narrow as a specific publisher's series or as broad as a request to send all material of a particular type or on a particular subject.

**blind reference**

1) An authority link (see or see also - 4xx and 5xx respectively) which points to an authority heading that does not exist in the database. 2) An authority heading (1xx) to which no bibliographic records are linked.

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**C**

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**cataloging source**

A code stored in tag 040 \$a that tells who created the record. These codes are governed by the MARC code list for libraries.

**chronology**

The date(s) used by the publisher on a serially-issued bibliographic unit to help identify or indicate when it was published. The chronology may reflect the dates of coverage, publication, or printing.

**content designators**

Tags, indicators, and subfield codes in a MARC record.

**D**

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**delimiter**

A separate character used in conjunction with a subfield code and introduces each subfield in a variable field.

**deposit account**

A deposit account is an account with a vendor that allows customers to pay all or a portion of the estimated annual billing in advance. Depending on the amount prepaid, the typical discount is from 1.5% to 4.5% more than with a regular plan, where invoices are paid after the receipt of titles.

**diacritical mark**

Any of various marks, such as a macron or cedilla, added to a letter or symbol to indicate its pronunciation or to distinguish it in some way.

**E**

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**enumeration**

The designation reflecting the alphabetic or numeric scheme used by the publisher on an item or assigned when the holdings statement is created to identify the individual bibliographic or physical parts and to show the relationship of each unit to the unit as a whole.

**express registration**

Entering patron information during the check-out process as a service to new, unregistered patrons.

**F**

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**first available copy requests**

Hold requests for specific issues of a serial title (such as the May 2015 issue of Horticulture Magazine ) or specific parts of a multi-part title (such as the first season of a television series on DVD).

**form subdivision**

A division of a subject heading which brings out the form of the work. For example, in the headings: Internet (Computer network) - Periodicals Library technicians - Bibliography

**free days**

A value applied at normal and bulk check-in, renewal, and offline that allows you to omit a specified number of days from the overdue fine calculation.

**G**

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**geographic qualifier**

The name of a larger geographic entity added to a local place name. For example, in the headings: Cambridge (Mass.) Toledo (Spain)

**geographic subdivision**

A subdivision which limits a topical subject heading to a specific geographic location. For example, in the headings: Women - Peru Libraries - New York (State)

**M**

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**monographic series**

A group of monographs with a collective title in addition to their individual titles. The individual titles may or may not be numbered. The collective title is generally found on the title page or the cover of each monograph.

**N**

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**non-integrated serial**

A non-integrated serial is an item that is linked to a bibliographic record with a MARC bibliographic level entry of S , but is not linked to a Serial Issue Record created through the Polaris Serials Module.

**R**

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**RTF**

Requests-To-Fill or RTF processing sends hold requests to designated libraries in a specified order. A library chooses to fill or deny the request. The request is routed until it is filled, it expires, or every library denies it.

**RTF routing cycle**

The request-to-fill (RTF) routing cycle includes a primary and a secondary cycle defined by the Holds Routing Tables. You can enter a number of branches as responder branches, beginning with the requestor (your) branch. The cycle tries to fill a hold at the same branch first, and then tries to fill the hold at the next branch listed in the primary routing table. After a preset amount of time, the branches in the secondary table try to fill the hold, each in turn.

**S**

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**SICI**

The colloquial name for Serial Item and Contribution Identifier. The SICI is the SISAC bar code. The SICI incorporates the ISSN and is used on scholarly, technical, medical and other subscription based serials.

**SISAC**

Serials Industry Systems Advisory Committee. This committee was instrumental in creating the supporting documentation for the NISO z39.56 standard.

**standing order**

An order placed with a vendor or the publisher directly for all publications in a series, all volumes in a set, or all publications of a single publisher.

**T**

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**trapped**

An item is said to be trapped for a hold when an item that fills a request is scanned at circulation and the system links the item to a specific request, either automatically or by displaying a message that prompts you for a decision.

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